Nova Scotia Product Market Match Study:

Technical Report

Prepared for:

Nova Scotia Tourism Partnership Council
and
Nova Scotia Department of Tourism and Culture

Prepared by:

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NOVA SCOTIA
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COUNCIL

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SECTION 1

INTRODUCTION

SECTION 1

INTRODUCTION

The Nova Scotia Tourism Product-Market Match Analysis was commissioned by Tourism Nova Scotia on behalf of the Product Development Committee of the Nova Scotia Tourism Partnership Council. Recognizing that not all tourism products in Nova Scotia are market-ready, and are of varying appeal in the marketplace, the Committee determined that it was important to get a clear understanding of the key tourism products that Nova Scotia should be further enhancing and taking to market, in other words, to identify the right products for the right markets. While there have been various individual tourism product studies conducted in Nova Scotia over the past few years, there has not been an effort to collectively prioritize and rank the province's tourism products in order to form the foundation for strategically focussing and prioritizing provincial and regional tourism products for future product development initiatives.

The specific objective of the Product Market Match Study was to assess Nova Scotia's tourism products by consolidating existing market and product research, providing a basis for scoring and ranking tourism products on both product and market criteria. In addition to this assessment and research consolidation, the process identified information and research gaps, emerging products for future development consideration in Nova Scotia, and key infrastructure needs as well as the most pressing product development needs within each product category.

The Product-Market Match Model created as part of this study provides a tool which will assist the province, regional organizations and the tourism industry in preparing product development strategies and in setting priorities. It will also provide a valuable framework on which to base discussion about product development, both at the provincial and regional level. The Model is designed to be updated as new market data and insights become available, and also to be "fine-tuned" to reflect different provincial and regional priorities. It should be viewed as an evolving, work-in-progress, not as a final, "written-in-stone" product.

It is important to note that there was no new research conducted for this Product Market Match study - it drew on existing consumer research, studies and strategies completed in Nova Scotia, as well as numerous studies and research undertaken in other jurisdictions across Canada and the United States.

CAUTIONS

The user of the Nova Scotia Product Market Match Model and the results generated by this model should exercise caution in the interpretation and use of this information. In particular, the following factors need to be taken into consideration:

- The model is a tool to be used to assist provincial and regional organizations in identifying which types of products should, potentially, be given priority consideration in future tourism development efforts. It should not be seen as a definitive planning tool, but rather one piece of the planning effort.

- The model is not designed or intended to be used to identify, or assist in the evaluation of, specific business opportunities.
- The results and rankings generated by the model are based on the data available to the consultants at the time the model was prepared. In some cases, good quality data directly related to the product and the criteria was available and was used as a basis for the score. In other cases, the scores were generated from data that was indirectly related to the product and, for a number of criteria, the scores were subjective. As such, the scoring for some products and some markets is more directly tied to research, and therefore more reliable, than it is for other products and other markets. In this context, considerably more caution should be used when looking at the scores for one particular market or one particular criteria, than when looking at the overall provincial rankings.
- The scores for the market-related criteria were not adjusted for the regional analysis since there was no data available on which to base this assessment. Therefore, the provincial scores for the market-related criteria are factored into the regional scoring. Since the market-related criteria account for 65% of the overall score, they have a significant impact on the overall score and ranking of each product. As such, situations occur in the regional scoring whereby a product's overall score does not realistically reflect the existing/potential quality of the product in that region.

THE PRODUCTS AND THE MARKETS

The Products

The product market match analysis was completed for each of the following products:

Nature/Outdoor Products:

- Walking/Hiking
- Natural Phenomena (tides, fossils, etc.)
- Cycling
- Sea Kayaking
- Shipwreck diving/scuba/marine parks
- Fishing
- Beaches - Sun, Sand, Swim
- Snowmobiling
- Cross Country Skiing
- National/provincial parks
- Campgrounds - RV
- Whale watching
- Wilderness Hiking
- Scenery - natural and cultural
- Canoeing
- Hunting
- Birdwatching
- Beaches - Coastline Experience
- Downhill skiing
- Bay of Fundy Nature Tourism
- Campgrounds - Tenting
- Yacht Cruises/Charters

Culture/Heritage Products:

- Historic Sites
- Music
- Theatre
- Small Museums/Interpretive Centres/ Art Galleries
- Marine Heritage including lighthouses
- Lunenburg/Annapolis Royal Heritage Communities
- Other Unique/Heritage Communities
- Major Museums
- Crafts

Other Products:

- Golf
- Meetings and Conventions - Halifax
- Meetings and Conventions - non-Halifax
- Destination Accommodations (resorts, quality seaside cottages)
- Learning Vacations
- Festivals and Events (excluding one time and mega events)
- Cruise Ship Visits
- Local sightseeing cruises and tours
- Cabot Trail
- Halifax Urban product (includes shopping, dining, entertainment, casino, etc.)
- Independent Touring
- Group Touring (motorcoach)

The Markets

Each product was evaluated for five different geographic markets:

- Atlantic Canada
- Quebec
- Europe
- Ontario
- New England/mid-Atlantic

The Nova Scotia market was not included in this assessment because very little of the information needed to complete the analysis was available for this market. The Product Development Committee recognizes that the provincial market is an important one for many tourism businesses, particularly during the shoulder periods and the November to April period. The collection of more information on the Nova Scotia market has been identified as a future research need and the Product Market Match Model is designed to incorporate such information in the future.

METHODOLOGY

Overall Approach

The Product Market Match process involved several key tasks, as follows:

- Consolidation of existing research material. No new research was undertaken.
- Development of evaluation criteria to be used in scoring and quantifying the products and markets. These criteria, described below, were developed in conjunction with the Steering Committee.
- Development of the product market match model, a Lotus based model.
- Identification of emerging products, based on research reviewed for the process, that might have potential for Nova Scotia.
- Identification of information/research gaps and the development of recommendations on research priorities as well as potential means of filling these gaps.
- Identification of key market readiness issues, key infrastructure issues and product development needs within each product category, again drawing from existing research and strategies.

The Evaluation Criteria

A total of eleven evaluation criteria were selected by the Steering Committee for this process, eight related to market issues and three related to product issues. Each criteria was weighted to reflect its overall importance. The criteria are listed below, with their respective weighting in brackets:

Market Criteria (Total Weight: 36 points or 65% of the total score)

- Existing Visitor Market Size (Weight: 3)
- Visitor Satisfaction Levels (Weight: 3)
- Potential Market Size (Weight: 5)
- Role of the Product as a Travel Motivator (Weight: 5)
- Role of the Product as a Demand Supporter for: (Weight: 3 in total)
    - Touring Market (Weight: 1.25)
    - Meetings and Incentive Travel Market (Weight: 0.75)
    - Urban Destination Market (Weight: 0.5)
    - Vacation Destination Market (Weight: 0.5)
- Growth Potential (Weight: 4)
- Multi-Season Potential (Weight: 10 in total)
    - Shoulder Season (May/June, September/October) (Weight: 5)
    - November to April (Weight: 5)
- Market Awareness (Weight: 3)

Readers of the report and users of the model results should note the emphasis given to seasonality in the weighting process. Given the importance of shoulder and November to

April tourism activity to the overall viability of the province's tourism sector, the Steering Committee decided that extra emphasis should be given to this criteria.

Product Criteria (Total Weight: 19.5 or 35%)

- Current Unique Selling Proposition (Weight: 7.5)
- Latent Resource Quality/Potential (Weight: 6)
- Constraints/Capacity Issues (that cannot be influenced) (Weight: 6)

The Scoring Process

Scores for some of the criteria (Existing Market Size, Visitor Satisfaction Levels, Potential Market Size, Role as a Travel Motivator and Growth Potential) were based largely on research data. For some products, the data was available to allow for a mathematical calculation of a score for these criteria; for other products, a number of different pieces of data were used, in combination with professional judgement, to develop the score. (In the detailed worksheets, scores that were developed in this manner are flagged).

For the other market criteria (Role of the Product as a Demand Supporter, Multi-Season Potential) and for all of the product criteria, the score was established based on the consultant's assessment, drawing on a range of information and insights gained from other studies and research. In product areas where no such research was available, interviews were conducted with key knowledgeable people to gain the necessary insights. (Again, the detailed worksheets flag the scores that were developed in this manner).

The Market Awareness Criteria was not scored in this process because of a lack of data. However, it is included in the model for future additions.

A more detailed description of each criteria and the scoring methodology for each is provided below:

Market Criteria

Existing Visitor Market Size

This is based on the number of visitors to Nova Scotia from each market who actually participate in the product/activity. Data from sources such as the 1996 Visitor Exit Survey and various Conversion Studies, provided information on the percentage of visitors from the different markets participating in the product/activity while on their visit to Nova Scotia. These percentages were multiplied by the number of visitors from that market and the resulting number of participants was then calculated as a percentage of all visitors to Nova Scotia from the five markets included in this assessment. The final number therefore represents the percentage of all Nova Scotia visitors that were from the particular origin market and that also participated in the activity while in the province.

For example, the 1996 Exit Survey indicated that 62% of Ontario visitors or 209,300 persons went walking/hiking. 209,300 represents 16% of the total May to October visitors from the five markets (1,286, 381) and the Ontario market was therefore given a score of 5 for this criteria for walking/hiking.

Many of the scores for this criteria were based on research done in 1996 or 1997, and therefore do not reflect any recent changes in participation levels that may have resulted from the development of new products or upgrading, e.g. changes in Nova Scotia's golf product that have occurred in the past three years. As new, updated information becomes available (e.g. from a proposed 2000 Visitor Exit Survey), the model can easily be updated.

Scores were assigned as follows:

Number of Visitors Participating	Percentage of Total Visitors (May to October) *	Assigned Score
0 - 1,286	0% - 0.1%	0
1,287 - 19,296	0.1% - 1.5%	1
19,297 - 45,023	1.5% to 3.5%	2
45,024 - 96,479	3.5% - 7.5%	3
96,480 - 192,957	7.5% - 15%	4
192,958 - 1,286,381	15% +	5

** Note for winter snow activities the number of off-season visitors was used as the basis for this calculation.*

Where participation rates were not available, the consultants have used a variety of other sources of data and information to generate estimates of volumes of activity, e.g. for the hunting product, the number of non-resident hunting licenses sold in the province was used as the basis for the score.

Visitor Satisfaction Levels

Scores for this criteria are based on the percentage of existing visitors to Nova Scotia responding to various surveys (e.g. Conversion Study, Marine Tourism Study, etc.) who indicated that their experience in/with the specific product in Nova Scotia was much better than their experience with a similar product elsewhere. Scores were assigned as follows:

Satisfaction Levels (% rating experience much better than experience elsewhere)	**Score**
Under 10%	0
10% to 19%	1
20% to 29%	2
30% to 39%	3
40% to 49%	4
50% plus	5

Again, much of this data is based on the experiences of visitors in 1997 or 1998, and may not, therefore, reflect recent product additions or upgrades.

Potential Market Size

This criteria considers the size of the potential market for each product/activity. The score is based on the number of visitors to Canada from each market, or, for Canadians, the number who made an interprovincial trip in Canada, multiplied by percentages from the 1997 Nova Scotia Conversion Study that indicated the product/activity was an important factor in their last vacation destination decision. The resulting data were then calculated as a percentage of all person trips to and within Canada (interprovincial trips only for Canadians). The resulting data is the percentage of all trips to and within Canada that were trips made by travellers from the particular market and for whom the activity was important in their destination decision. (This method understates the real potential market size, since it does not include all trips made in which the activity/product was a factor in their decisions. Specifically, it excludes foreign trips for Canadians, as well as domestic trips for Americans, and international trips by Americans to another destination.)

Scores were assigned as follows:

0	0.00% to 0.09%	1	0.10% to 2.49%
2	2.50% to 7.49%	3	7.50% to 12.49%
4	12.50% to 19.99%	5	20.00% plus

Role of the Product as a Travel Motivator

This is based upon the same percentage used in the foregoing criterion - the percentage from the 1997 conversion study who stated that the activity was an important factor in their last vacation destination decision. The resulting data represents the percentage of visitors from that market for whom the product/activity was important in selecting a vacation destination. Scores were assigned as follows:

0	0.000% to 0.009%	1	0.10% to 9.99%
2	10.00% to 24.99%	3	25.00% to 49.99%
4	50.00% to 74.99%	5	75.00% plus

Role of the Product as a Demand Supporter

This is based upon an estimate by the consultants of the degree to which the activity is likely to contribute to strengthening the appeal of Nova Scotia as a destination for several different trip purposes - Touring, Meetings and Conventions, Urban Destination and Vacation Destination. The consultants referred to data on participation rates, where it was available, to help make the assesements for the touring market. Separate measures were made for each of four types of trips - Touring, Meetings and Conventions, Urban Destination and Vacation Destination.

0 None
1 Limited interest, and only for a very small percentage of the market
2 Of interest/importance to part of the market
3 Important activities for much of the market
4 Important contributing factor in travel motivation and destination choice
5 Very important, almost a critical factor, in destination choice

Growth Potential

This is based upon changes in the participation rate in the activity, drawing on data from several major studies that have examined participation rates in various activities over different time periods. Most of this information relates to general participation levels, not participation during trips, however, it does provide an indication of growth rates. Consideration was also given to potential future growth rates, given general demographic and psychographic trends.

0 Market has declined in size and trends suggest this likely to continue
1 Market is static
2 Market has been showing some growth but the future is uncertain
3 Market has grown modestly and might reasonably be expected to continue to grow
4 Market is showing moderate growth and there is some evidence that this should continue
5 Market is growing very strongly and there is evidence that growth will continue.

Where available, actual historical growth rates in participation in the activity were used as a guiding factor in this assessment.

Multi-Season Potential

Shoulder Seasons:

This is based upon an estimate by the consultants of the potential contribution the activity/product might be able to make in future to growing shoulder season tourism. This would include its potential direct contribution to generating shoulder season travel, as well as whether it might encourage those travelling for other purposes to make trips. In other words, it is a measure of the product/activity's potential as a demand generator and/or a demand supporter in the shoulder season. The basis for the estimate was consideration of; a) the likely interest in the product/activity in the shoulder season and b) the likely level of interest - a combination of appeal versus intervening/competing opportunities available in that season.

0 Product has no appeal/potential in either spring or fall
1 Product has limited appeal/potential in spring and/or fall
2 Product has moderate appeal/potential in either spring and/or fall
3 Product has reasonably good appeal/potential in spring and/or fall
4 Product has strong appeal/potential in spring or fall, and some appeal/potential in the other shoulder season
5 Product is very strong in both spring and fall

November to April

This is based upon an estimate by the consultants of the potential contribution the product/activity might be able to make in future to growing tourism during the November to April period. This would include its potential direct contribution to generating visits to Nova Scotia in the November to April period, as well as whether it might encourage those travelling for other purposes to make trips. In other words, it is a measure of the activity's potential as a demand generator and/or a demand supporter in the November to May period. The basis for the estimate was consideration of; a) the likely interest in the activity in the November to April period and b) the likely level of interest - a combination of appeal versus intervening/competing opportunities available in that period.

0 Product has no appeal/ potential in November to April period
1 Product has very modest appeal/ potential for some of this period
2 Product has some reasonable appeal/potential in some regions or for some of the period
3 Product has good potential/appeal but is either very weather dependent or has potential in only a limited number of regions
4 Product has strong potential/appeal for a few regions of the province
5 Product has strong appeal/potential throughout the province and for much of the November to April period

Market Awareness

This is intended to be a measure of the level of recognition among consumers within each market of Nova Scotia as an appealing destination for the activity. However, there is very little data available related to awareness levels for individual products and this criteria **has not been scored for any product.** As noted earlier, scores for this criteria could be added at a later date.

Product Criteria

In all cases, the scoring on the product criteria is subjective, drawing on information contained in numerous studies, strategies, and publications, as well as research conducted for other studies and knowledge of the province.

Current Unique Selling Proposition

This has been scored based on consideration of a combination of; a) the quality and appeal of the experience available in Nova Scotia compared to that at competing destinations, and b) the uniqueness of Nova Scotia's product.

0	Little or no competitive product, nothing unique, very limited appeal
1	Some competitive product but nothing particularly unique
2	Reasonably competitive product
3	Some unique appeals, good facilities
4	Competitive product, relatively unique experiences
5	Very strong appeal, highly unique experience in Nova Scotia, clearly better than the competition

Latent Resource Potential

This score is based on an estimate of the degree to which Nova Scotia has the natural and other resources on which to develop new, quality product. Again, the score is based on the findings reported in other studies and publications, as well as knowledge of the province.

0	Little or no quality resources available
1	Limited resources available, quality is minimal
2	Resources are reasonable, quality is moderate
3	Reasonably good quality resources available
4	Very good quality resources
5	Exceptional resources/assets on which to build

Product Constraints/Capacity for Growth

This is an estimate of the challenges and barriers faced in expanding this product in Nova Scotia, as well as any constraints as to capacity/growth. It speaks primarily to things that cannot be influenced, or are very difficult to influence, such as the availability of fish stocks, or whale populations. Issues such as infrastructure capacity and financial viability are not included in the assessment of this criteria.

0 Major challenges to expanding this product and/or little capacity to expand the activity
1 Some strong resource-based challenges to expanding this product
2 Some resource barriers, at least in some areas of the province
3 Generally minimal barriers, although constraints in some areas
4 Minimal barriers, generally good resource capacity for expansion
5 Few barriers to growth/high level of resource capacity for expansion of the activity

How the Scoring Worksheets Work

The detailed worksheets for each of the products are provided on the next page for illustration purposes. The worksheet calculations work as follows:

1. Each of the five markets has been given a weighting based on the average spending per party in Nova Scotia. This information is shown in the top two lines of the table. The data on current visitation is provided for reference purposes only. (It does not match to the total existing visitation to Nova Scotia because some markets, for example Other US markets, were not included in this evaluation).

2. The criteria are listed down the left hand side, with their weighting (as described earlier) in the first column.

3. A score has been assigned to each criteria, for each market, based on the guidelines described above. These scores are presented in the first column under each geographic market.

4. The score is multiplied by the weighting for the criteria and by the weighting for the market, to give the number of points, provided in the second column for each geographic market.

5. The number of points is totalled for all market criteria, and for all product criteria, for each geographic market, and then calculated as a percentage of a perfect score so that they can more easily be compared one to the other. The total for both market and product criteria is provided in the bottom row.

6. The grand total for all markets and all criteria, is totalled in the right-hand column. The totals for market criteria and product criteria, and for product and market criteria together, are then transferred to the summary sheets for ranking purposes.

Scores shown in boxes indicate that the score was not driven directly by the data. Scores shown with a shaded background indicate a subjective assessment.

NOTE: The numbers in shaded sections, and in the small boxes across the "Sub-total rows" are internal to the working of the model and not part of the evaluation.

THE MODEL AND WHAT IT CAN DO

The Product Market Match Model has been built on a LOTUS platform. It includes individual worksheets for each of the fifty or so products that have been evaluated as well as summary ranking sheets. The model has been designed for maximum flexibility and easy updating. Some of its key features are:

- The model is very easy to use - a main input screen allows the user to select the type of ranking they are interested in (e.g. by region, province, market or product criteria, etc.) and then almost immediately see the results and print a summary page.
- The weighting assigned to each criteria can be changed by the Model Administrator, and the changes will flow through the full model;
- The Tier thresholds (see discussion below) can be changed by the Model Administrator and the changes will flow through all reports generated;
- The rankings of the products can be summarized in numerous different ways:
  a. On a province-wide basis, or regional basis, for market and product criteria together, or separately
  b. On a province-wide basis, or regional basis, for each geographic market
  c. On a province-wide basis, or regional basis, either including or excluding the scores for the European market
  d. On a province-wide basis, or regional basis, for each criteria or for any combination of criteria
  e. On a province-wide basis, or regional basis, for criteria related to future potential only, that is excluding the criteria on existing visitor market size, existing satisfaction levels and current unique selling proposition
  f. In a cluster of nature-related products or culture/heritage related products
- As new data becomes available, the worksheets can be updated to reflect changes in the marketplace and in product development.

The ranking of the products is based on the calculation of the total points awarded as a percentage of a perfect score. For some criteria for some products, it was not possible to generate a score because of a lack of data. In these cases, the percentages are calculated only for those criteria that have been scored, so as to avoid the impact of criteria that could not be scored. In other words, if we were only able to score five out of eight of market criteria, the percentage is based only on the perfect score for those five.

The Product Market Match Report Run

The reports (a set of main reports is provided in Section 2) created for each run have several features, as described below:

Report Configuration

The top panel describes the key features of the report, specifically:

- The region - either province or one of the seven regions
- The criteria included in the analysis
- Whether scores for the European market are included in the analysis
- Which origin markets are included in the analysis
- Whether the criteria weightings are the original ones, described in this report, or whether they have been adjusted

The bottom panel presents the products, in rank order.

Reliability of the Scoring

On the product market match reports, the reliability of the scoring (*see the far left hand column*) for each product category has been rated in one of three ways:

- ***All*** - meaning that all criteria for all markets are scored
- ***OK*** - meaning that there are no more than 5 blank cells in the worksheet
- ***Caution*** - meaning that there are more than 5 blank cells in the worksheet

Note that this reliability report only appears if all criteria are included in the evaluation.

Ranking and Grouping by Tier

Products are presented in rank order. They have also been grouped into Tiers, based on the following scoring levels:

Tier 1:	Scored over 60% of a perfect score
Tier 2:	Scored between 50% and 59% of a perfect score
Tier 3:	Scored between 40% and 49% of a perfect score
Tier 4:	Scored between 20% and 40% of a perfect score

Those products scoring below 20% (pre-determined as a minimum threshold) are noted as "Below T". The thresholds for each Tier can be changed by the Model Administrator. In the regional summary, products that are not relevant for that region are indicated with an N/A. Products that have not been scored at all because of limited data are shown below the line.

SECTION 2

SUMMARY REPORTS FOR THE PROVINCE AND THE REGIONS

THE ECONOMIC PLANNING GROUP of Canada
Tourism and Hospitality Consultants

NOVA SCOTIA TOURISM PRODUCT-MARKET MATCH REPORT RUN

REPORT CONFIGURATION:

REGION:	PROVINCE
CRITERIA:	ALL CRITERIA
EUROPE SCORES:	NOT INCLUDED
ORIGIN MARKET:	ALL
CRITERIA WEIGHTINGS:	Default

STAT**	PRODUCT	%	TIER	RANK
ALL	Scenery: Natural & Cultural	76%	ONE	1
ALL	Historic Sites	65%	ONE	2
ALL	Walking/Hiking	62%	ONE	3
ALL	Meetings and Convention - Halifax	60%	ONE	4
ALL	Major Museums	59%	TWO	5
OK	Destination Accommodations (Resorts, Quality Cottages)	59%	TWO	6
OK	Marine Heritage	58%	TWO	7
OK	Cabot Trail	57%	TWO	8
ALL	Beaches: Coastline/Walking/Seacoast	57%	TWO	9
ALL	Birdwatching	56%	TWO	10
OK	Lunenburg/Annapolis Royal Heritage Communities	53%	TWO	11
OK	Cruise Ship Visits	53%	TWO	12
OK	Halifax Urban Product including dining, entertainment, etc.	53%	TWO	13
OK	Bay of Fundy Nature Product	53%	TWO	14
OK	Group Touring	50%	TWO	15
Caution	Camping - Recreational Vehicles	50%	TWO	16
OK	Other Unique/Heritage Communities	49%	THREE	17
ALL	Whale Watching	49%	THREE	18
Caution	Local Sightseeing Cruises and Tours	49%	THREE	19
ALL	Music (represents live music events)	49%	THREE	20
ALL	National/Provincial Parks	49%	THREE	21
OK	Festivals and Events (excluding one-time mega events)	48%	THREE	22
ALL	Natural Phenomenon - Fossils, Tides	47%	THREE	23
ALL	Wilderness Hiking	45%	THREE	24
ALL	Sea Kayaking	44%	THREE	25
OK	Crafts	44%	THREE	26
ALL	Golf	44%	THREE	27
ALL	Theatre	39%	FOUR	28
ALL	Meetings and Conventions - non-Halifax	39%	FOUR	29
ALL	Cycling	38%	FOUR	30
OK	Beaches: Sun/Sand/Swim	37%	FOUR	31
ALL	Canoeing	36%	FOUR	32
ALL	Learning Vacations	36%	FOUR	33
ALL	Small Museums/Interpretive Centres	35%	FOUR	34
OK	Camping - Tenting	34%	FOUR	35
ALL	Shipwreck Diving, SCUBA, Marine Parks	31%	FOUR	36
OK	Yacht Cruises/Charters	29%	FOUR	37
ALL	Fishing	28%	FOUR	38
OK	Snowmobiling	22%	FOUR	39
OK	Downhill Skiing	18%	BelowT*	40
OK	Cross-Country Skiing	18%	BelowT*	41
OK	Hunting	16%	BelowT*	42
Caution	Cultural Experiences (African NS)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Aboriginal)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Celtic)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Acadian)	0%	NOT RANKED	n/a
ALL	Independent Touring	0%	NOT RANKED	n/a

* BelowT indicates that the product scored below a pre-determined minimum threshold, currently set to 20% of a perfect score.

PRODUCT-MARKET MATCH REPORT RUN

REPORT CONFIGURATION:

REGION:	PROVINCE
CRITERIA:	ALL CRITERIA
EUROPE SCORES:	INCLUDED
ORIGIN MARKET:	ALL
CRITERIA WEIGHTINGS:	Default

STAT**	PRODUCT	%	TIER	RANK
ALL	Scenery: Natural & Cultural	75%	ONE	1
OK	Historic Sites	62%	ONE	2
OK	Walking/Hiking	62%	ONE	3
OK	Beaches: Coastline/Walking/Seacoast	60%	ONE	4
Caution	Destination Accommodations (Resorts, Quality Cottages)	57%	TWO	5
OK	Birdwatching	57%	TWO	6
Caution	Marine Heritage	57%	TWO	7
OK	Major Museums	55%	TWO	8
Caution	Group Touring	54%	TWO	9
OK	Cabot Trail	54%	TWO	10
Caution	Halifax Urban Product including dining, entertainment, etc.	54%	TWO	11
Caution	Cruise Ship Visits	53%	TWO	12
Caution	Camping - Recreational Vehicles	52%	TWO	13
Caution	Bay of Fundy Nature Product	51%	TWO	14
Caution	Local Sightseeing Cruises and Tours	51%	TWO	15
Caution	Lunenburg/Annapolis Royal Heritage Communities	50%	TWO	16
OK	National/Provincial Parks	50%	TWO	17
OK	Whale Watching	49%	THREE	18
OK	Meetings and Convention - Halifax	49%	THREE	19
OK	Natural Phenomenon - Fossils, Tides	49%	THREE	20
Caution	Other Unique/Heritage Communities	47%	THREE	21
Caution	Festivals and Events (excluding one-time mega events)	46%	THREE	22
OK	Sea Kayaking	45%	THREE	23
OK	Wilderness Hiking	45%	THREE	24
OK	Golf	43%	THREE	25
Caution	Crafts	43%	THREE	26
OK	Music (represents live music events)	43%	THREE	27
OK	Cycling	37%	FOUR	28
OK	Learning Vacations	37%	FOUR	29
OK	Canoeing	37%	FOUR	30
OK	Theatre	36%	FOUR	31
Caution	Camping - Tenting	36%	FOUR	32
Caution	Beaches: Sun/Sand/Swim	35%	FOUR	33
OK	Small Museums/Interpretive Centres	33%	FOUR	34
ALL	Shipwreck Diving, SCUBA, Marine Parks	32%	FOUR	35
OK	Meetings and Conventions - non-Halifax	31%	FOUR	36
OK	Fishing	25%	FOUR	37
Caution	Snowmobiling	22%	FOUR	38
Caution	Yacht Cruises/Charters	20%	FOUR	39
Caution	Cross-Country Skiing	18%	BelowT*	40
Caution	Downhill Skiing	16%	BelowT*	41
Caution	Hunting	16%	BelowT*	42
Caution	Cultural Experiences (African NS)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Aboriginal)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Celtic)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Acadian)	0%	NOT RANKED	n/a
OK	Independent Touring	0%	NOT RANKED	n/a

* BelowT indicates that the product scored below a pre-determined minimum threshold, currently set to 20% of a perfect score

PRODUCT-MARKET MATCH REPORT RUN

REPORT CONFIGURATION:

REGION: Cape Breton
CRITERIA: ALL CRITERIA
EUROPE SCORES: NOT INCLUDED
ORIGIN MARKET: ALL
CRITERIA WEIGHTINGS: Default

STAT**	PRODUCT	%	TIER	RANK
ALL	Scenery: Natural & Cultural	82%	ONE	1
ALL	Walking/Hiking	67%	ONE	2
ALL	Historic Sites	66%	ONE	3
OK	Cabot Trail	61%	ONE	4
OK	Destination Accommodations (Resorts, Quality Cottages)	59%	TWO	5
ALL	Major Museums	54%	TWO	6
OK	Group Touring	54%	TWO	7
ALL	Beaches: Coastline/Walking/Seacoast	53%	TWO	8
Caution	Camping - Recreational Vehicles	53%	TWO	9
OK	Marine Heritage	53%	TWO	10
OK	Festivals and Events (excluding one-time mega events)	53%	TWO	11
ALL	Music (represents live music events)	53%	TWO	12
ALL	National/Provincial Parks	52%	TWO	13
ALL	Whale Watching	52%	TWO	14
OK	Other Unique/Heritage Communities	51%	TWO	15
ALL	Golf	51%	TWO	16
OK	Cruise Ship Visits	50%	TWO	17
ALL	Birdwatching	48%	THREE	18
ALL	Meetings and Conventions - non-Halifax	48%	THREE	19
ALL	Wilderness Hiking	48%	THREE	20
Caution	Local Sightseeing Cruises and Tours	46%	THREE	21
ALL	Natural Phenomenon - Fossils, Tides	45%	THREE	22
ALL	Sea Kayaking	44%	THREE	23
ALL	Cycling	43%	THREE	24
OK	Crafts	42%	THREE	25
ALL	Learning Vacations	42%	THREE	26
OK	Camping - Tenting	40%	THREE	27
ALL	Theatre	39%	FOUR	28
OK	Yacht Cruises/Charters	36%	FOUR	29
ALL	Small Museums/Interpretive Centres	36%	FOUR	30
ALL	Shipwreck Diving, SCUBA, Marine Parks	35%	FOUR	31
OK	Beaches: Sun/Sand/Swim	35%	FOUR	32
OK	Snowmobiling	33%	FOUR	33
OK	Hunting	32%	FOUR	34
ALL	Canoeing	31%	FOUR	35
ALL	Fishing	31%	FOUR	36
OK	Cross-Country Skiing	28%	FOUR	37
OK	Downhill Skiing	22%	FOUR	38
Caution	Bay of Fundy Nature Product	0%	NOT APP.	n/a
Caution	Lunenburg/Annapolis Royal Heritage Communities	0%	NOT APP.	n/a
Caution	Halifax Urban Product including dining, entertainment, etc.	0%	NOT APP.	n/a
Caution	Meetings and Convention - Halifax	0%	NOT APP.	n/a
Caution	Cultural Experiences (African NS)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Aboriginal)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Celtic)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Acadian)	0%	NOT RANKED	n/a
Caution	Independent Touring	0%	NOT RANKED	n/a

* BelowT indicates that the product scored below a pre-determined minimum threshold, currently set to 20% of a perfect score.

PRODUCT-MARKET MATCH REPORT RUN

REPORT CONFIGURATION:

REGION:	**South Shore**
CRITERIA:	**ALL CRITERIA**
EUROPE SCORES:	**NOT INCLUDED**
ORIGIN MARKET:	**ALL**
CRITERIA WEIGHTINGS:	**Default**

STAT**	PRODUCT	%	TIER	RANK
ALL	Scenery: Natural & Cultural	79%	ONE	1
OK	Destination Accommodations (Resorts, Quality Cottages)	62%	ONE	2
OK	Marine Heritage	59%	TWO	3
ALL	Walking/Hiking	57%	TWO	4
ALL	Birdwatching	56%	TWO	5
OK	Lunenburg/Annapolis Royal Heritage Communities	55%	TWO	6
OK	Other Unique/Heritage Communities	54%	TWO	7
OK	Festivals and Events (excluding one-time mega events)	53%	TWO	8
ALL	Beaches: Coastline/Walking/Seacoast	53%	TWO	9
ALL	Major Museums	52%	TWO	10
ALL	Historic Sites	50%	TWO	11
ALL	Meetings and Conventions - non-Halifax	50%	TWO	11
OK	Crafts	50%	TWO	13
Caution	Local Sightseeing Cruises and Tours	49%	THREE	14
OK	Group Touring	47%	THREE	15
Caution	Camping - Recreational Vehicles	46%	THREE	16
ALL	National/Provincial Parks	46%	THREE	17
OK	Cruise Ship Visits	45%	THREE	18
ALL	Sea Kayaking	44%	THREE	19
OK	Beaches: Sun/Sand/Swim	44%	THREE	20
ALL	Golf	42%	THREE	21
ALL	Music (represents live music events)	42%	THREE	22
ALL	Small Museums/Interpretive Centres	41%	THREE	23
ALL	Cycling	41%	THREE	24
ALL	Whale Watching	39%	FOUR	25
ALL	Theatre	39%	FOUR	26
ALL	Learning Vacations	39%	FOUR	27
ALL	Wilderness Hiking	37%	FOUR	28
OK	Yacht Cruises/Charters	35%	FOUR	29
ALL	Natural Phenomenon - Fossils, Tides	35%	FOUR	30
OK	Camping - Tenting	34%	FOUR	31
ALL	Fishing	33%	FOUR	32
ALL	Shipwreck Diving, SCUBA, Marine Parks	33%	FOUR	33
ALL	Canoeing	31%	FOUR	34
OK	Hunting	21%	FOUR	35
OK	Cross-Country Skiing	14%	BelowT*	36
OK	Snowmobiling	12%	BelowT*	37
Caution	Meetings and Convention - Halifax	0%	NOT APP.	n/a
Caution	Halifax Urban Product including dining, entertainment, etc.	0%	NOT APP.	n/a
Caution	Cabot Trail	0%	NOT APP.	n/a
Caution	Bay of Fundy Nature Product	0%	NOT APP.	n/a
Caution	Downhill Skiing	0%	NOT APP.	n/a
Caution	Cultural Experiences (African NS)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Aboriginal)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Celtic)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Acadian)	0%	NOT RANKED	n/a
Caution	Independent Touring	0%	NOT RANKED	n/a

* BelowT indicates that the product scored below a pre-determined minimum threshold, currently set to 20% of a perfect score.

PRODUCT-MARKET MATCH REPORT RUN

REPORT CONFIGURATION:

REGION:	**Annapolis Valley**
CRITERIA:	**ALL CRITERIA**
EUROPE SCORES:	**NOT INCLUDED**
ORIGIN MARKET:	**ALL**
CRITERIA WEIGHTINGS:	**Default**

STAT**	PRODUCT	%	TIER	RANK
ALL	Scenery: Natural & Cultural	66%	ONE	1
ALL	Historic Sites	61%	ONE	2
ALL	Walking/Hiking	60%	ONE	3
ALL	Birdwatching	56%	TWO	4
OK	Bay of Fundy Nature Product	55%	TWO	5
ALL	Whale Watching	55%	TWO	6
OK	Lunenburg/Annapolis Royal Heritage Communities	54%	TWO	7
ALL	Natural Phenomenon - Fossils, Tides	52%	TWO	8
OK	Destination Accommodations (Resorts, Quality Cottages)	51%	TWO	9
OK	Other Unique/Heritage Communities	51%	TWO	10
OK	Marine Heritage	50%	TWO	11
ALL	National/Provincial Parks	49%	THREE	12
OK	Festivals and Events (excluding one-time mega events)	47%	THREE	13
OK	Group Touring	47%	THREE	14
Caution	Camping - Recreational Vehicles	47%	THREE	15
ALL	Beaches: Coastline/Walking/Seacoast	45%	THREE	16
ALL	Wilderness Hiking	45%	THREE	17
Caution	Local Sightseeing Cruises and Tours	45%	THREE	18
ALL	Theatre	44%	THREE	19
ALL	Meetings and Conventions - non-Halifax	43%	THREE	20
OK	Crafts	42%	THREE	21
ALL	Canoeing	41%	THREE	22
ALL	Small Museums/Interpretive Centres	41%	THREE	23
ALL	Cycling	41%	THREE	24
ALL	Golf	40%	THREE	25
ALL	Learning Vacations	39%	FOUR	26
OK	Cruise Ship Visits	37%	FOUR	27
ALL	Music (represents live music events)	36%	FOUR	28
OK	Camping - Tenting	35%	FOUR	29
ALL	Major Museums	32%	FOUR	30
ALL	Fishing	28%	FOUR	31
ALL	Sea Kayaking	27%	FOUR	32
OK	Downhill Skiing	24%	FOUR	33
OK	Beaches: Sun/Sand/Swim	23%	FOUR	34
OK	Cross-Country Skiing	20%	FOUR	35
OK	Snowmobiling	19%	BelowT*	36
ALL	Shipwreck Diving, SCUBA, Marine Parks	17%	BelowT*	37
OK	Hunting	15%	BelowT*	38
OK	Yacht Cruises/Charters	10%	BelowT*	39
Caution	Halifax Urban Product including dining, entertainment, etc.	0%	NOT APP.	n/a
Caution	Cabot Trail	0%	NOT APP.	n/a
Caution	Meetings and Convention - Halifax	0%	NOT APP.	n/a
Caution	Cultural Experiences (African NS)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Aboriginal)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Celtic)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Acadian)	0%	NOT RANKED	n/a
Caution	Independent Touring	0%	NOT RANKED	n/a

* BelowT indicates that the product scored below a pre-determined minimum threshold, currently set to 20% of a perfect score.

PRODUCT-MARKET MATCH REPORT RUN

REPORT CONFIGURATION:

REGION:	**Fundy Shore**
CRITERIA:	**ALL CRITERIA**
EUROPE SCORES:	**NOT INCLUDED**
ORIGIN MARKET:	**ALL**
CRITERIA WEIGHTINGS:	**Default**

STAT**	PRODUCT	%	TIER	RANK
ALL	Scenery: Natural & Cultural	76%	ONE	1
ALL	Walking/Hiking	60%	ONE	2
ALL	Natural Phenomenon - Fossils, Tides	54%	TWO	3
OK	Marine Heritage	54%	TWO	4
OK	Bay of Fundy Nature Product	52%	TWO	5
ALL	Birdwatching	51%	TWO	6
ALL	Wilderness Hiking	50%	TWO	7
ALL	Major Museums	49%	THREE	8
ALL	National/Provincial Parks	48%	THREE	9
OK	Destination Accommodations (Resorts, Quality Cottages)	48%	THREE	10
ALL	Beaches: Coastline/Walking/Seacoast	48%	THREE	11
ALL	Historic Sites	46%	THREE	12
Caution	Camping - Recreational Vehicles	44%	THREE	13
Caution	Local Sightseeing Cruises and Tours	42%	THREE	14
OK	Festivals and Events (excluding one-time mega events)	39%	FOUR	15
ALL	Theatre	39%	FOUR	16
OK	Crafts	39%	FOUR	17
ALL	Meetings and Conventions - non-Halifax	38%	FOUR	18
ALL	Small Museums/Interpretive Centres	38%	FOUR	19
OK	Other Unique/Heritage Communities	37%	FOUR	20
OK	Group Touring	36%	FOUR	21
ALL	Golf	35%	FOUR	22
ALL	Sea Kayaking	35%	FOUR	23
OK	Camping - Tenting	34%	FOUR	24
ALL	Music (represents live music events)	34%	FOUR	25
ALL	Learning Vacations	34%	FOUR	26
OK	Snowmobiling	33%	FOUR	27
ALL	Cycling	31%	FOUR	28
OK	Beaches: Sun/Sand/Swim	29%	FOUR	29
OK	Cross-Country Skiing	28%	FOUR	30
ALL	Fishing	25%	FOUR	31
OK	Downhill Skiing	22%	FOUR	32
OK	Hunting	18%	BelowT*	33
ALL	Shipwreck Diving, SCUBA, Marine Parks	17%	BelowT*	34
ALL	Canoeing	16%	BelowT*	35
OK	Yacht Cruises/Charters	10%	BelowT*	36
Caution	Meetings and Convention - Halifax	0%	NOT APP.	n/a
Caution	Cabot Trail	0%	NOT APP.	n/a
Caution	Cruise Ship Visits	0%	NOT APP.	n/a
Caution	Halifax Urban Product including dining, entertainment, etc.	0%	NOT APP.	n/a
ALL	Whale Watching	0%	NOT APP.	n/a
Caution	Lunenburg/Annapolis Royal Heritage Communities	0%	NOT APP.	n/a
Caution	Cultural Experiences (African NS)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Aboriginal)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Celtic)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Acadian)	0%	NOT RANKED	n/a
Caution	Independent Touring	0%	NOT RANKED	n/a

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* BelowT indicates that the product scored below a pre-determined minimum threshold, currently set to 20% of a perfect score.

PRODUCT-MARKET MATCH REPORT RUN

REPORT CONFIGURATION:

REGION: Eastern Shore
CRITERIA: ALL CRITERIA
EUROPE SCORES: NOT INCLUDED
ORIGIN MARKET: ALL
CRITERIA WEIGHTINGS: Default

STAT**	PRODUCT	%	TIER	RANK
ALL	Scenery: Natural & Cultural	71%	ONE	1
ALL	Walking/Hiking	57%	TWO	2
OK	Destination Accommodations (Resorts, Quality Cottages)	53%	TWO	3
ALL	Beaches: Coastline/Walking/Seacoast	53%	TWO	4
ALL	Historic Sites	50%	TWO	5
OK	Marine Heritage	50%	TWO	6
ALL	Sea Kayaking	47%	THREE	7
ALL	National/Provincial Parks	46%	THREE	8
ALL	Birdwatching	45%	THREE	9
ALL	Wilderness Hiking	44%	THREE	10
OK	Beaches: Sun/Sand/Swim	44%	THREE	11
ALL	Major Museums	42%	THREE	12
Caution	Camping - Recreational Vehicles	40%	THREE	13
OK	Group Touring	39%	FOUR	14
ALL	Canoeing	38%	FOUR	15
ALL	Meetings and Conventions - non-Halifax	38%	FOUR	16
ALL	Music (represents live music events)	37%	FOUR	17
OK	Festivals and Events (excluding one-time mega events)	37%	FOUR	18
Caution	Local Sightseeing Cruises and Tours	35%	FOUR	19
OK	Other Unique/Heritage Communities	35%	FOUR	20
ALL	Natural Phenomenon - Fossils, Tides	32%	FOUR	21
ALL	Golf	32%	FOUR	22
ALL	Theatre	31%	FOUR	23
ALL	Learning Vacations	31%	FOUR	24
OK	Camping - Tenting	31%	FOUR	25
OK	Crafts	31%	FOUR	26
ALL	Cycling	31%	FOUR	27
ALL	Small Museums/Interpretive Centres	28%	FOUR	28
ALL	Fishing	28%	FOUR	28
OK	Hunting	24%	FOUR	30
OK	Yacht Cruises/Charters	24%	FOUR	31
ALL	Shipwreck Diving, SCUBA, Marine Parks	22%	FOUR	32
OK	Snowmobiling	19%	BelowT*	33
OK	Cross-Country Skiing	17%	BelowT*	34
Caution	Downhill Skiing	0%	NOT APP.	n/a
Caution	Lunenburg/Annapolis Royal Heritage Communities	0%	NOT APP.	n/a
ALL	Whale Watching	0%	NOT APP.	n/a
Caution	Halifax Urban Product including dining, entertainment, etc	0%	NOT APP.	n/a
Caution	Cruise Ship Visits	0%	NOT APP.	n/a
Caution	Cabot Trail	0%	NOT APP.	n/a
Caution	Meetings and Convention - Halifax	0%	NOT APP.	n/a
Caution	Bay of Fundy Nature Product	0%	NOT APP.	n/a
Caution	Cultural Experiences (African NS)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Aboriginal)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Celtic)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Acadian)	0%	NOT RANKED	n/a
Caution	Independent Touring	0%	NOT RANKED	n/a

* BelowT indicates that the product scored below a pre-determined minimum threshold, currently set to 20% of a perfect score.

PRODUCT-MARKET MATCH REPORT RUN

REPORT CONFIGURATION:

REGION:	**Northumberland Shore**
CRITERIA:	**ALL CRITERIA**
EUROPE SCORES:	**NOT INCLUDED**
ORIGIN MARKET:	**ALL**
CRITERIA WEIGHTINGS:	**Default**

STAT**	PRODUCT	%	TIER	RANK
ALL	Scenery: Natural & Cultural	71%	ONE	1
ALL	Walking/Hiking	52%	TWO	2
OK	Destination Accommodations (Resorts, Quality Cottages)	50%	TWO	3
OK	Marine Heritage	50%	TWO	4
OK	Other Unique/Heritage Communities	48%	THREE	5
ALL	Birdwatching	48%	THREE	6
OK	Festivals and Events (excluding one-time mega events)	47%	THREE	7
ALL	Major Museums	47%	THREE	8
ALL	Historic Sites	46%	THREE	9
OK	Beaches: Sun/Sand/Swim	44%	THREE	10
ALL	Beaches: Coastline/Walking/Seacoast	43%	THREE	11
ALL	Golf	42%	THREE	12
Caution	Camping - Recreational Vehicles	40%	THREE	13
ALL	Theatre	39%	FOUR	14
OK	Crafts	39%	FOUR	15
Caution	Local Sightseeing Cruises and Tours	39%	FOUR	16
ALL	National/Provincial Parks	38%	FOUR	17
OK	Cruise Ship Visits	37%	FOUR	18
ALL	Meetings and Conventions - non-Halifax	36%	FOUR	19
ALL	Small Museums/Interpretive Centres	35%	FOUR	20
ALL	Natural Phenomenon - Fossils, Tides	35%	FOUR	21
ALL	Music (represents live music events)	34%	FOUR	22
OK	Group Touring	33%	FOUR	23
ALL	Cycling	33%	FOUR	24
ALL	Wilderness Hiking	32%	FOUR	25
OK	Yacht Cruises/Charters	32%	FOUR	26
ALL	Learning Vacations	31%	FOUR	27
OK	Snowmobiling	30%	FOUR	28
OK	Camping - Tenting	29%	FOUR	29
ALL	Sea Kayaking	27%	FOUR	30
OK	Cross-Country Skiing	23%	FOUR	31
ALL	Fishing	23%	FOUR	32
OK	Hunting	18%	BelowT*	33
ALL	Shipwreck Diving, SCUBA, Marine Parks	17%	BelowT*	34
ALL	Canoeing	16%	BelowT*	35
Caution	Bay of Fundy Nature Product	0%	NOT APP.	n/a
Caution	Meetings and Convention - Halifax	0%	NOT APP.	n/a
Caution	Cabot Trail	0%	NOT APP.	n/a
ALL	Whale Watching	0%	NOT APP.	n/a
Caution	Halifax Urban Product including dining, entertainment, etc	0%	NOT APP.	n/a
Caution	Lunenburg/Annapolis Royal Heritage Communities	0%	NOT APP.	n/a
OK	Downhill Skiing	0%	NOT APP.	n/a
Caution	Cultural Experiences (African NS)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Aboriginal)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Celtic)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Acadian)	0%	NOT RANKED	n/a
Caution	Independent Touring	0%	NOT RANKED	n/a

* BelowT indicates that the product scored below a pre-determined minimum threshold, currently set to 20% of a perfect score

NOVA SCOTIA TOURISM PRODUCT-MARKET MATCH REPORT RUN

REPORT CONFIGURATION:

REGION:	**Halifax**
CRITERIA:	**ALL CRITERIA**
EUROPE SCORES:	**NOT INCLUDED**
ORIGIN MARKET:	**ALL**
CRITERIA WEIGHTINGS:	**Default**

STAT**	PRODUCT	%	TIER	RANK
ALL	Meetings and Convention - Halifax	71%	ONE	1
ALL	Historic Sites	66%	ONE	2
OK	Cruise Ship Visits	64%	ONE	3
OK	Marine Heritage	59%	TWO	4
ALL	Major Museums	57%	TWO	5
OK	Destination Accommodations (Resorts, Quality Cottages)	57%	TWO	6
OK	Halifax Urban Product including dining, entertainment, etc.	56%	TWO	7
ALL	Music (represents live music events)	55%	TWO	8
OK	Group Touring	53%	TWO	9
OK	Festivals and Events (excluding one-time mega events)	53%	TWO	10
Caution	Local Sightseeing Cruises and Tours	50%	TWO	11
ALL	Walking/Hiking	45%	THREE	12
OK	Crafts	44%	THREE	13
ALL	Theatre	44%	THREE	14
ALL	Golf	43%	THREE	15
ALL	Whale Watching	39%	FOUR	16
Caution	Camping - Recreational Vehicles	39%	FOUR	17
ALL	Learning Vacations	39%	FOUR	18
ALL	Small Museums/Interpretive Centres	38%	FOUR	19
ALL	Shipwreck Diving, SCUBA, Marine Parks	35%	FOUR	20
ALL	Fishing	33%	FOUR	21
OK	Yacht Cruises/Charters	30%	FOUR	22
Caution	Camping - Tenting	22%	FOUR	23
OK	Cross-Country Skiing	7%	BelowT*	24
Caution	Hunting	0%	NOT APP.	n/a
Caution	Snowmobiling	0%	NOT APP.	n/a
Caution	Downhill Skiing	0%	NOT APP.	n/a
Caution	Canoeing	0%	NOT APP.	n/a
Caution	Scenery: Natural & Cultural	0%	NOT APP.	n/a
Caution	Wilderness Hiking	0%	NOT APP.	n/a
Caution	Beaches: Sun/Sand/Swim	0%	NOT APP.	n/a
Caution	Cycling	0%	NOT APP.	n/a
Caution	Meetings and Conventions - non-Halifax	0%	NOT APP.	n/a
Caution	Cabot Trail	0%	NOT APP.	n/a
Caution	Beaches: Coastline/Walking/Seacoast	0%	NOT APP.	n/a
Caution	Birdwatching	0%	NOT APP.	n/a
Caution	Lunenburg/Annapolis Royal Heritage Communities	0%	NOT APP.	n/a
Caution	Bay of Fundy Nature Product	0%	NOT APP.	n/a
Caution	Other Unique/Heritage Communities	0%	NOT APP.	n/a
Caution	National/Provincial Parks	0%	NOT APP.	n/a
Caution	Natural Phenomenon - Fossils, Tides	0%	NOT APP.	n/a
Caution	Sea Kayaking	0%	NOT APP.	n/a
Caution	Cultural Experiences (African NS)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Aboriginal)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Celtic)	0%	NOT RANKED	n/a
Caution	Cultural Experiences (Acadian)	0%	NOT RANKED	n/a
Caution	Independent Touring	0%	NOT RANKED	n/a

* BelowT indicates that the product scored below a pre-determined minimum threshold, currently set to 20% of a perfect score.

SECTION 3

DETAILED PRODUCT REPORTS

THE ECONOMIC PLANNING GROUP of Canada
Tourism and Hospitality Consultants

PRODUCT: WALKING/HIKING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels* • *Ont/Que data is for "other Canadians*	46% participation rate; 305,800 persons **Score: 5**	62% participation rate; 209,300 persons **Score: 5**	62% participation rate; 47,700 persons **Score: 2**	71% participation rate 122,300 persons **Score: 4**	72% participation rate 25,000 persons **Score: 1**
Visitor Satisfaction Levels • *Data from NS Conversion Study; % saying "recreational walking" is much better than elsewhere*	24% **Score : 2**	15% **Score: 1**	25% **Score: 2**	New England: 17% Mid Atlantic: 18% **Score: 1**	N/A
Potential Market Size • *Data is from 1997 Conversion Study; % saying "recreational walking" was important to decision to visit most recent vacation destination* • *Applied to total person trips from the market, to or within Canada (inter-provincial)*	68% Potential Market: 1.1 million person trips **Score: 3**	72% Potential Market: 2.5 million person trips **Score: 4**	80% Potential Market: 1.5 million person trips **Score 3**	67% Potential Market: 2.7 million person trips **Score: 5**	N/A
Role as a Travel Motivator • *Data is from 1997 Conversion Study; % saying "recreational walking" was important to decision to visit most recent vacation destination*	68% **Score: 4**	72% **Score: 4**	80% **Score: 5**	67% **Score: 4**	N/A
Role as a Demand Supporter • *Comments are subjective*	Very strong for touring market - high participation in walking/hiking, part of the NS experience Very limited for meetings market Some interest to urban destination market, particularly guided walking tours, waterfronts Important activity for the vacation destination market - seaside walks, short hikes are part of vacation experience for significant portion of this market				
Growth Potential • *Data from US Forest Service Study; Increase in number of participants 1982-1994;*	Walking: 43%; Hiking: 93% compared to population growth of 13.4% Score: 4				Estimated at same score as North America

<table>
<tr><th colspan="6">PRODUCT: WALKING/HIKING</th></tr>
<tr><th>CRITERIA</th><th>ATLANTIC CANADA</th><th>ONTARIO</th><th>QUEBEC</th><th>NEW ENGLAND MID-ATLANTIC</th><th>EUROPE</th></tr>
<tr><td>Multi-Season Potential - Shoulder
• Comments are subjective</td><td colspan="5">Moderate potential to generate trips in spring/fall; stronger appeal for European market because of their greater level of interest in shoulder season travel</td></tr>
<tr><td>Multi-Season Potential - Nov to April
• Comments are subjective</td><td>Limited potential to generate trips</td><td colspan="3">No appeal/potential to provide a direct contribution to generating trips - intervening competition closer to home, perceptions of weather - rain, cold, fog</td><td>Limited potential to generate trips -</td></tr>
<tr><td>PRODUCT CRITERIA</td><td colspan="5"></td></tr>
<tr><td>Current Unique Selling Proposition
• Comments are subjective</td><td colspan="5">Although walking/hiking participated in by a significant percentage of visitors, province does not have a strong USP for this product, particularly with respect to having sufficient, quality product to be the demand generator for a trip. Some notable strengths include National Park trails, coastal beach walks. Province is getting some increasing recognition of walking/hiking product in specialty magazines - e.g. Cape Split. Cape Chignecto trails Availability of a variety of quality, market-ready product is improving with recent additions to product and upgrading of basic infrastructure.</td></tr>
<tr><td>Latent Resource Quality/Potential
• Comments are subjective</td><td colspan="5">Province has an excellent quality natural resource base for walking and hiking - a variety of landscapes, oceanfront, inland wilderness areas, fall colours, waterfalls, wildlife, etc. all relatively accessible to travel routes and to the necessary infrastructure such as accommodations, restaurants.</td></tr>
<tr><td>Constraints to Growth
• Comments are subjective</td><td colspan="5">No major constraints to further development. Challenges include availability of public lands, access over private lands, conflicts with motorized uses and other land/resource uses.</td></tr>
</table>

REGIONAL SCORES

Walking/Hiking	**Average Prov'l Score**	**Cape Breton**	**South Shore**	**Annapolis Valley**	**Fundy Shore**	**Eastern Shore**	**Northumb. Shore**	**Halifax Urban**
		Score	Score	Score	Score	Score	Score	Score
Current USP	3	4	2	3	3	2	1	1
Latent Resource Quality	5	5	4	4	4	4	3	2
Constraints to Growth	3	4	3	3	3	3	3	1
Percent of Perfect Score	72%	86%	58%	66%	66%	58%	45%	26%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY
PRODUCT:
Walking/Hiking

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	**POINTS**
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		**(Excl.**
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		**Europe)**
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	5	15	5	30	3	18	4	36	2	24	99
Visitor Satisfaction Levels	3	2	6	1	6	2	12	1	9		0	33
Potential Market Size	5	3	15	4	40	3	30	5	75		0	160
Role of the Product as a Travel Motivator	5	4	20	5	50	4	40	4	60		0	170
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	4	5	4	10	4	10	4	15	4	20	40
- Meetings and Incentive Travel Market	0.75	1	0.75	1	1.5	1	1.5	1	2.25	1	3	6
- Urban Destination Market	0.5	2	1	2	2	2	2	2	3	2	4	8
- Vacation Destination Market	0.5	3	1.5	3	3	3	3	3	4.5	3	6	12
Growth Potential	4	4	16	4	32	4	32	4	48	4	64	128
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	2	10	2	20	2	20	2	30	3	60	80
November to April	5	1	5	0	0	0	0	0	0	1	20	5
Market Awareness NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*33*	**95.3**	*33*	**194.5**	*33*	**168.5**	*33*	**282.8**	*20*	**201.0**	**741**
Score as % of a Perfect Score			58%		59%		51%		57%		50%	56%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	3	45	3	45	3	67.5	3	90	180
Latent Resource Quality/Potential	6	5	30	5	60	5	60	5	90	5	120	240
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		*19.5*	**70.5**	*19.5*	**141.0**	*19.5*	**141.0**	*19.5*	**211.5**	*19.5*	**282.0**	**564**
Score as % of a Perfect Score			72%		72%		72%		72%		72%	72%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**166**	**52.5**	**336**	**52.5**	**310**	**52.5**	**494**	**39.5**	**483**	**1305**
Score as % of a Perfect Score			63%		64%		59%		63%		61%	62%

NOTES:

REGIONAL COMMENTS

Cape Breton
Extensive, market-ready, quality trail network in Cape Breton Highlands National Park offering a variety of experiences and difficulty.

Numerous other trails throughout Cape Breton with others under development, e.g. Ile Madame

Natural resources for trail development are excellent - variety of landscapes, vistas, ocean/inland

South Shore
Trail development fairly limited at present, particularly from Bridgewater to Halifax. Some exceptions such as Keji Seaside Adjunct, There is an opportunity for more trail development

Potential for new trail development is good, particularly from Bridgewater west; abandoned rail line currently under development as multi-use trail there are also opportunities within HRM, e.g. Terence Bay Protected Area, old HRM watershed, Peggy's Cove area

Constraints include limited coastal public lands in some areas, increasing residential development, conflicts between user groups and resources

Annapolis Valley
Reasonably good supply of developed trails, including Kejimkujik, Balancing Rock, Delaps Cove and established hiking areas

Potential good to offer more developed, market-ready trails such as at Cape Blomidon; also abandoned rail line has trail potential

Constraints include land not in public ownership, conflicts with user groups

Eastern Shore
Number of trails is more limited but there are a variety of market ready trails, e.g. Liscombe, Musquodoboit River Trail, Canso, at provincial parks

High quality natural resources for further trail development, both hiking/wilderness hiking in Salmon River Wilderness Area, Canso Barrens, Tangier Grand, and walking in coastal parks and on converted rail line

Main constraints are conflict with other resource users such as forestry

Northumberland Shore
Existing market ready trails are more limited; include some around Antigonish, waterfront trail in New Glasgow, Cape George area. Abandoned rail line conversion currently underway.

Available areas for further development are also more limited - lack of public land and need to work with private landowners a constraint

Fundy Shore
Network of developed trails is increasing with Fundy Eco Tour Program

Excellent natural resources for further development, particularly coastal trails; e.g. opportunity for more day use hiking/loops in connection Cape Chignecto

Halifax Urban Area
Existing trails within urban area are very limited and not market ready

Potential exists for more trail development and efforts already underway in some areas, such as Cole Harbour, Little Sackville River, Pennant Point.

Major constraint is availability of public land.

WALKING/HIKING

MARKET READINESS ISSUES

- Some trails in need of upgrading, basic infrastructure, signage, resolution of public access issues
- Many trails around (inventory of 500 or so) but only a small portion are identified, signed, accessible and developed to a standard that can be promoted
- Trail Development Standards exist - need to encourage/ensure their use
- Difficulty finding walking/hiking trails unless have local knowledge or detailed guide books
- Need for parking areas, directional signage from main roads
- Need to clearly identify/designate which trails are multi-use (i.e. available for motorized uses, cycling) and hiking so that users are aware

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Coastal access/vistas are a key feature of the province's appeal as a destination for hiking/walking - need to ensure protection of sufficient, and significant, coastal areas in order to provide a range and variety of coastal hiking experiences
- Liability - if trails are promoted, have to be to a certain standard
- Development costs
- Ongoing maintenance costs and responsibility
- Conflicts of user groups - motorized vs non-motorized

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Signage icon for hiking trails to help find site/trailhead; needs to be used consistently
- Improved basic infrastructure - directional and interpretive signs on trails, parking areas, privies, garbage cans, drinking water, trail information brochures
- Identify different types of products, e.g. Urban trails, coastal trails, forest trails, multi-use trails, challenging, etc. and identify gaps in supply
- Encourage application of standards that have been established for trail development, especially for priority trails/those that receive heavy use; link use of standards to funding initiatives
- Improved trail maintenance
- Look-offs/picnic areas at coastal viewing spots
- Establish more loop, coastal hiking trails designed for day and multi-day trips - possible areas include Port Mouton, Whitehead/Canso, Economy/Five Islands, Prospect/Terence Bay
- Add linking/loop trails and shorter trails to existing wilderness trail areas to increase appeal to "less adventurous" - e.g. at Cape Chignecto; encourage new trail development to be loops not linear and with coastal/scenic views
- Prepare overall trail development plan - and be pro-active with communities to get key opportunities developed
- Develop a provincial hiking brochure/map illustrating location of trails that are "market ready", with some indication of their degree of difficulty, time required, type of experiences, multi-use vs hiking, etc. Make use of the inventory/GIS mapping of trails that has been completed and work with existing resources such as that available through the Museum of Natural History and Parks Canada to develop appropriate interpretive material.

PRODUCT: WHALE WATCHING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels* • *Ont/Que data is for "other Canadians*	1% participation rate; 6,600 persons **Score: 1**	7% participation rate; 23,600 persons **Score: 2**	7% participation rate; 5,400 persons **Score: 1**	8 % participation rate 13,800 persons **Score: 1**	16% participation rate 5,500 persons **Score: 1**
Visitor Satisfaction Levels • *Data from NS Conversion Study; % saying "whale watching" is much better than elsewhere*	28% **Score : 2**	53% **Score: 5**	35% **Score: 3**	New England: 43% Mid Atlantic: 32% **Score: 4**	N/A
Potential Market Size • *Data is from 1997 Conversion Study; % saying "whale watching" was important to decision to visit most recent vacation destination; Applied to total person trips from the market, to or within Canada* • *European data is participation in wildlife viewing on all European trips to Canada; based on CTC Pleasure Travel Market Studies for UK & Germany*	23% Potential Market: 375.6 thousand person trips **Score: 2**	37% Potential Market: 1.3 million person trips **Score: 3**	37% Potential Market: 709.2 thousand person trips **Score: 2**	20.7% Potential Market: 842.3 thousand person trips **Score: 2**	44% Potential Market: 1.01 million person trips **Score: 3**
Role as a Travel Motivator • *Data is from 1997 Conversion Study; % saying "whale watching" was important to decision to visit most recent vacation destination*	23% **Score: 2**	37% **Score: 3**	37% **Score: 3**	20.7% **Score: 2**	N/A
Role as a Demand Supporter • *Comments are subjective*	Important activity for portion of the touring market - though participation levels are not as high as might be expected , given role of whale watching in motivating trips Very limited for meetings market and not an important supporting activity to the urban destination market Of very limited importance to the vacation destination market				
Growth Potential • *Report for the Whale and Dolphin Conservation Society*	Indicates number of marine mammal watchers world wide increased 10% annually from 1993 to 1994; Score 4 for all markets.				

PRODUCT: WHALE WATCHING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Multi-Season Potential - Shoulder • *Comments are subjective*	Moderate potential to contribute to generating trips in late spring and early fall, based on availability of whales				
Multi-Season Potential - Nov to April • *Comments are subjective*	No potential - no resource available in the November to April period				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Nova Scotia has very strong competitive/advantage and positioning as destination for whale watching; high profile of Bay of Fundy for whales; image frequently used in marketing				
Latent Resource Quality/Potential • *Comments are subjective*	Resource generally good in areas with whale watching - Bay of Fundy, Cape Breton, Halifax/south shore Some concerns re strength of the resource, conflicts with shipping traffic and capacity to accommodate whale watching activity without harming the resource.				
Constraints to Growth • *Comments are subjective*	Capacity for future growth limited by the importance of protecting a limited resource				

REGIONAL SCORES

Whale Watching	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	4	4	2	5	0	0	0	2
Latent Resource Quality	3	3	1	4	0	0	0	1
Constraints to Growth	2	3	2	2	0	0	0	2
Percent of Perfect Score	62%	68%	34%	75%	0%	0%	0%	34%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:
Whale Watching

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL POINTS (Excl. Europe)
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	1	3	2	12	1	6	1	9	1	12	30
Visitor Satisfaction Levels	3	2	6	5	30	3	18	4	36		0	90
Potential Market Size	5	2	10	3	30	2	20	2	30	3	60	90
Role of the Product as a Travel Motivator	5	2	10	3	30	3	30	2	30		0	100
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	3	3.75	3	7.5	3	7.5	3	11.25	3	15	30
- Meetings and Incentive Travel Market	0.75	1	0.75	1	1.5	1	1.5	1	2.25	1	3	6
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential	4	4	16	4	32	4	32	4	48	4	64	128
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	2	10	2	20	2	20	2	30	2	40	80
November to April	5	0	0	0	0	0	0	0	0	0	0	0
Market Awareness- NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*33*	**60.0**	*33*	**164.0**	*33*	**136.0**	*33*	**198.0**	*25*	**196.0**	**558**
Score as % of a Perfect Score			36%		50%		41%		40%		39%	42%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	4	30	4	60	4	60	4	90	4	120	240
Latent Resource Quality/Potential	6	3	18	3	36	3	36	3	54	3	72	144
Product Potential - Constraints/Capacity for Growth	6	2	12	2	24	2	24	2	36	2	48	96
Sub total: Product Related Criteria		*19.5*	**60.0**	*19.5*	**120.0**	*19.5*	**120.0**	*19.5*	**180.0**	*19.5*	**240.0**	**480**
Score as % of a Perfect Score			62%		62%		62%		62%		62%	62%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**120**	**52.5**	**284**	**52.5**	**256**	**52.5**	**378**	**44.5**	**436**	**1038**
Score as % of a Perfect Score			46%		54%		49%		48%		49%	49%

NOTES:

14/01/00

REGIONAL COMMENTS

Cape Breton
Good whale watching off Cheticamp and also northern Cape Breton

Resource is of reasonably good quality, though not as strong as Bay of Fundy

South Shore
Very limited existing product operating out of the Lunenburg area

Availability of resource is less consistent year to year than other whale watching locations in the province

Annapolis Valley
Large number of whale watching operators - Bay of Fundy has a strong USP for whale watching opportunities

High quality resource - reliable sightings, unique and interesting species, complemented by other marine mammals

Continued availability of quality resource, and management of capacity to ensure sustainability of the resource are constraints to growth

Eastern Shore
No product/resource in this area

Northumberland Shore
No product/resource in this area

Fundy Shore
No product/resource in this area

Halifax Urban Area
Some product available operating out of Halifax and Peggy's Cove

Resource quality/availability is inconsistent

Limited resource in these areas is major constraint to growth

WHALE WATCHING

MARKET READINESS ISSUES

- Does not appear to be shortage in quantity - operators not at capacity
- Quality inconsistent- of boats, interpretation, shore and support facilities, facilities and services on the boats, customer service levels
- Access to operators can be a challenge - no permanent office on-shore, hard for potential customers to reach them re bookings and information
- Signage and directions inconsistent and often poor quality

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Resource protection/management is an important issue that has to be considered - potential need to consider regulating new entrants into the business if there protecting the resource becomes a key issue
- Ensuring quality product in terms of safety, customer service and interpretation
- Liability insurance - costs
- Regulatory issues, particularly different regulations for charter and passenger operations

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Provincial code of ethics for whale watching operators (in place on Bay of Fundy)
- Voluntary certification program
- Establish quality assurance initiatives - possibly some form of certification and code of ethics; minimum standards/training for entry
- Identify capacity limits on number of new operators who can enter the market in certain areas so as not to overutilize the resource
- Training in interpretation, customer service, etc.
- Identify shore based whale and seal observation points and erect panels to describe/interpret
- Package whale watching with other ecotourism opportunities - sea bird watching, mass migration
- Develop whale watching in Brown's Bank and Sable Island area - needs careful consideration of impacts on resource
- Interpretive literature on whale watching
- Address regulatory inconsistencies

PRODUCT: WILDERNESS HIKING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels; reduced by 50% to account for overstatement because of use of term "hiking in a wilderness area" in Exit Survey* • *Ont/Que data is for "other Canadians*	4% participation rate; 26,600 persons Score: 2	10% participation rate; 33,800 persons Score: 2	10% participation rate; 7,700 persons Score: 1	12 % participation rate 20,700 persons Score: 2	10.5% participation rate 3,600 persons Score: 1
Visitor Satisfaction Levels • *Data from NS Conversion Study; % saying "hiking" is much better than elsewhere*	29% Score : 2	26% Score: 2	22% Score: 2	New England: 15% Mid Atlantic: 13% Score: 1	N/A
Potential Market Size • *Data is from 1997 Conversion Study; % saying "hiking" was important to decision to visit most recent vacation destination* • *Applied to total person trips from the market, to or within Canada (inter-provincial)*	33% Potential Market: 538.9 thousand person trips Score: 2	35% Potential Market: 1.2 million person trips Score: 3	40% Potential Market: 766.8 thousand person trips Score: 2	29% Potential Market: 1.18 million person trips Score: 3	N/A
Role as a Travel Motivator • *Data is from 1997 Conversion Study; % saying "hiking" was important to decision to visit most recent vacation destination*	33% Score: 3	35% Score: 3	40% Score: 3	29% Score: 3	N/A
Role as a Demand Supporter • *Comments are subjective*	True "wilderness hiking" of limited importance for the touring market because of need for relatively high level of fitness, specialized equipment, willingness to camp out overnight No potential for meetings and incentive travel market, or urban destination market Very limited potential to contribute to vacation destination market				
Growth Potential • *Data from US Forest Service Study; Increase in number of participants 1982-1994*	73% increase in number of participants, compared to population growth of 13.4% Score: 4				Estimated at same score as North America

PRODUCT: WILDERNESS HIKING					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
Multi-Season Potential - Shoulder • *Comments are subjective*	Moderate potential to contribute to generating trips in late spring and early fall when weather is more moderate; more potential from European market because of interest in outdoors, higher acceptance of inclement weather				
Multi-Season Potential - Nov to April • *Comments are subjective*	No potential - weather conditions not suitable except perhaps for some very limited winter hiking				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Nova Scotia has increasingly strong competitive position as destination for wilderness hiking with development of new facilities such as Cape Chignecto; also Cape Breton Highlands trails. USP stronger in the Atlantic Canada market, where there is limited comparable product; more competition and intervening opportunities available to other Canadian, US, and European markets				
Latent Resource Quality/Potential • *Comments are subjective*	Natural resources are good to excellent for wilderness hiking - variety of terrain and landscapes, ocean vistas, potential to see wildlife, etc.				
Constraints to Growth • *Comments are subjective*	Capacity for future growth limited by conflicting use of resources, concern from resident populations re their access to natural areas, challenge of developing infrastructure				

REGIONAL SCORES

Wilderness Hiking	**Average Prov'l Score**	**Cape Breton**	**South Shore**	**Annapolis Valley**	**Fundy Shore**	**Eastern Shore**	**Northumb. Shore**	**Halifax Urban**
		Score	Score	Score	Score	Score	Score	Score
Current USP	2.1	3	1	3	3	1	0	▨
Latent Resource Quality	3	4	2	2	4	4	1	▨
Constraints to Growth	3	2	2	3	3	3	2	▨
Total Score as a % of a Perfect Score	53%	60%	32%	54%	66%	51%	18%	▨

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT

Wilderness Hiking

NB - Some of data based on hiking, not wilderness hiking

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	POINTS
Current Visitation to NS May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		(Excl.
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		Europe)
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size (hiking in a wilderness area)	3	2	6	2	12	1	6	2	18	1	12	42
Visitor Satisfaction Levels (hiking)	3	2	6	2	12	2	12	1	9		0	39
Potential Market Size (hiking)	5	2	10	3	30	2	20	3	45		0	105
Role of the Product as a Travel Motivator (hiking)	5	3	15	3	30	3	30	3	45		0	120
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	1	1.25	1	2.5	1	2.5	1	3.75	2	10	10
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	2	4	4
Growth Potential (backpacking)	4	4	16	4	32	4	32	4	48	4	64	128
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	2	10	2	20	2	20	2	30	3	60	80
November to April	5	1	5	0	0	0	0	0	0	0	0	5
Market Awareness- NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		33	**69.8**	33	**139.5**	33	**123.5**	33	**200.3**	20	**150.0**	**533**
Score as % of a Perfect Score			42%		42%		37%		40%		38%	40%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	2	30	2	30	2	45	2	60	128
Latent Resource Quality/Potential	6	3	18	3	36	3	36	3	54	3	72	144
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		19.5	**58.5**	19.5	**102.0**	19.5	**102.0**	19.5	**153.0**	19.5	**204.0**	**416**
Score as % of a Perfect Score			60%		52%		52%		52%		52%	53%
TOTAL: MARKET AND PRODUCT CRITERIA		52.5	**128**	52.5	**242**	52.5	**226**	52.5	**353**	39.5	**354**	**949**
Score as % of a Perfect Score			49%		46%		43%		45%		45%	45%

NOTES:

REGIONAL COMMENTS

Cape Breton
Existing, market ready wilderness hiking trails within National Park

High quality natural resources for further wilderness hiking development, such as Gabarus area, northern tip of Cape Breton

Major constraint is local concerns/opposition

South Shore
Wilderness trails virtually non-existent

Natural resources for wilderness trail development are limited - little public land, limited "wilderness"

Constraints include increasing development, conflicts with other resource users

Annapolis Valley
Kejimkujik National Park includes network of market-ready wilderness hiking trails, with appropriate support infrastructure

Resources for further development not as extensive as in other areas - some potential in Tobeatic Wilderness area

Eastern Shore
Currently no market ready wilderness hiking trails although there are some areas with undeveloped trails.

Area has some excellent natural resources for wilderness hiking - Tangier Grand, Canso Barrens, Salmon River Protected Area- all reasonably easily accessible and offering a variety of different experiences but no trails developed at present

Main constraint is conflict with other resource users.

Northumberland Shore
No wilderness hiking trails at present

Natural resources suitable for wilderness trail development are very limited

Fundy Shore
Recent development of Cape Chignecto providing a high quality, wilderness hiking trail in this region

Other exist areas with potential including the Cobequid Mountains

Halifax Urban Area - N/A

WILDERNESS HIKING

(See comments under walking/hiking as well)

MARKET READINESS ISSUES

- Quality, wilderness hiking trails are limited -not sufficient for NS to be recognized as a destination for such. Recent/ongoing developments, e.g. Cape Chignecto, and some profile in magazines, are helping but need additional quality product to become a destination for wilderness hiking.
- Need to ensure that established standards are used, particularly with respect to safety issues. Also need to improve signage, and accessibility
- Need improved access to trails, particularly for people who want to experience the trail but not for a multi-day stay

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Competition with resource-based industries
- Opposition from local residents to "wilderness" designation and no motorized use
- Costs of development
- Responsibility for ongoing maintenance

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- "Flagship" wilderness/coastal hiking trails that can become icons in the hiking world. Possible locations: NW Cape Breton (Pleasant Bay area?), Canso Coastal Barrens, Gabarus Bay, Economy Area. Develop several "icons" that can become signature wilderness hiking trails such as Cape Chignecto;
- Create loops as well as linear trails to broaden appeal to "soft core hikers/walkers" - markets other than those who are prepared to undertake multi-day, strenuous hikes involving camping out.
- Create other shorter, less strenuous trails in the same area as signature trails to create a "hiking" destination area
- Create better road access to help make trails more accessible to a broader market
- Package for winter cross country ski trips

PRODUCT: NATURAL PHENOMENA: FOSSILS, TIDES etc.

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from Conversion study for "hunting for fossils", reduced by the average 'overstatement' factor calculated for activities where both Exit and Conversion study data is available*	2.8% participation rate; 18,600 persons Score: 2	10% participation rate; 33,400 persons Score: 3	4.7% participation rate; 3,600 persons Score: 2	4% participation rate 6,900 persons Score: 2	N/A
Visitor Satisfaction Levels • *Data from 1997 NS Conversion Study; % saying "hunting for fossils" is much better than elsewhere; Based on small sample size*	55% Score : 5	42% Score: 4	20% Score: 2	New England: 60% Mid Atlantic: 0% Score: 4	N/A
Potential Market Size • *Data is from 1997 Conversion Study; % saying "hunting for fossils" was important to decision to visit most recent vacation destination.* • *Applied to total person trips from the market, to or within Canada (inter-provincial) Score then increased by 1 in all markets to provide allowance for "tides"*	7% Potential Market: 114.3 thousand person trips Score: 2	13% Potential Market: 456 thousand person trips Score: 3	9% Potential Market: 172.5 thousand person trips Score: 2	7.3% Potential Market: 297 thousand person trips Score: 2	N/A
Role as a Travel Motivator • *Data is from 1997 Conversion Study; % saying "hunting for fossils" was important to decision to visit most recent vacation destination; Score then increased by 1 in all markets to provide allowance for "tides"*	7% Score: 2	13% Score: 3	9% Score: 2	7.3% Score: 2	
Role as a Demand Supporter • *Comments are subjective*	Of limited importance for the touring market, as evidenced by low participation rates and motivation; However, data does not address role of tides, which may be of more importance as a demand supporter No potential for meetings and incentive travel market, or urban destination market Very limited potential to contribute to vacation destination market				

PRODUCT: NATURAL PHENOMENA: FOSSILS, TIDES etc.

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Growth Potential •	Based on general growth trends in adventure/nature tourism estimated at some 15% per year North American wide. Score estimated at 3 for Atlantic Canada; 4 for other markets				
Multi-Season Potential - Shoulder • *Comments are subjective*	Moderate potential to contribute to generating trips in late spring and early fall when weather is more moderate; less potential from New England market because of more limited appeal of this product				
Multi-Season Potential - Nov to April • *Comments are subjective*	Very limited potential in this close by market	No potential - not a sufficiently appealing/motivating product to contribute to attracting demand at this time of year from these markets			Some limited appeal because of interest of this market in outdoors
PRODUCT CRITERIA					
Current Unique Selling Proposition	Fundy Tides are the strongest natural phenomena but NS has not had a strong USP for this product compared to New Brunswick; there is little in the way of interpretation of the tides. Has stronger USP for fossils, geology, dinosaurs, with good interpretation in Fundy Shore area.				
Latent Resource Quality/Potential	Latent resource quality is limited other than tides and fossils, and perhaps barrens, and only strong in two or three regions of the province. Doesn' t have unique phenomena such as icebergs that NF has. (NB: This does not include consideration of marine mammals, birds, etc. that are covered under other product areas)				
Constraints to Growth	No major constraints to growth but care has to be taken to manage growth to ensure sustainable product.				

REGIONAL SCORES

Natural Phenomena - Tides, Fossils	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	3	2	1	3	3	0	1	
Latent Resource Quality	2	3	1	4	5	1	1	
Constraints to Growth	4	3	2	4	4	2	2	
Percent of Perfect Score	60%	52%	26%	72%	78%	6%	26%	

NOVA SCOTIA PRODUCT MARKET MATCH STUDY
PRODUCT:
Natural Phenomenon - Fossils, Tides

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	**POINTS (Excl. Europe)**
Current Visitation to NS May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size (1)	3	2	6	3	18	2	12	2	18		0	54
Visitor Satisfaction Levels - (1)	3	5	15	4	24	2	12	4	36		0	87
Potential Market Size (1)	5	2	10	3	30	2	20	2	30	3	60	90
Role of the Product as a Travel Motivator- (1)	5	2	10	3	30	2	20	2	30		0	90
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	1	1.25	1	2.5	1	2.5	1	3.75	1	5	10
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential (adventure/nature tourism)	4	3	12	4	32	4	32	4	48	4	64	124
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	2	10	2	20	2	20	1	15	2	40	65
November to April	5	1	5	0	0	0	0	0	0	1	20	5
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*33*	**69.8**	*33*	**157.5**	*33*	**119.5**	*33*	**182.3**	*22*	**191.0**	**529**
Score as % of a Perfect Score			42%		48%		36%		37%		43%	40%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	3	45	3	45	3	67.5	3	90	180
Latent Resource Quality/Potential	6	2	12	2	24	2	24	2	36	2	48	96
Product Potential - Constraints/Capacity for Growth	6	4	24	4	48	4	48	4	72	4	96	192
Sub total: Product Related Criteria		*19.5*	**58.5**	*19.5*	**117.0**	*19.5*	**117.0**	*19.5*	**175.5**	*19.5*	**234.0**	**468**
Score as % of a Perfect Score			60%		60%		60%		60%		60%	60%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**128**	**52.5**	**275**	**52.5**	**237**	**52.5**	**358**	**41.5**	**425**	**997**
Score as % of a Perfect Score			49%		52%		45%		45%		51%	47%

NOTES:

1 1997 Nova Scotia Market Agency Conversion Study, question referred to 'participation in, satisfaction with, importance of, fossil hunting', score increased by '1' for each of these criteria to provide an allowance for 'tides'.

REGIONAL COMMENTS

Cape Breton
Little in the way of tides and fossils but does have other natural phenomenon such as waterfalls, Bras d'Or Lakes, Margaree River (a Heritage River)

Quality of these natural resources is good with potential for more development/interpretation for visitors

South Shore
Very limited "natural phenomenon" product and natural resources of the area do not offer much potential in this respect

Lack of resources a major constraint to growth

Annapolis Valley
Fundy Tides present in this area, also some unique rock formations such as Balancing Rock. However, little interpretation or profile and USP for these products is moderate; this is being addressed to some extent through the Bay of Fundy Product Club.

Area has excellent natural resources for this product but require interpretation, enhanced market readiness.

Eastern Shore
Very limited "natural phenomenon" product and natural resources of the area do not offer much potential in this respect

Lack of resources a major constraint to growth

Northumberland Shore
Limited "natural phenomenon" product although there are some fossil deposits in Arisaig.

Natural resources of the area do not offer much potential for further development.

Lack of resources a major constraint to growth

Fundy Shore
Area has Fundy tides, Parrsboro fossils, Dinosaur discoveries, Geological Museum and is developing a USP for these types of experiences

Natural resources of the area offer some potential for further development and interpretation for visitors

Little in the way of constraints to growth.

Halifax Urban Area - N/A

NATURAL PHENOMENA

This product category includes such phenomena as tides, fossils, geological features, dinosaurs and barrens. There is considerable overlap between this product category and other products, particularly the Bay of Fundy Nature Product which is the primary area for tides, and products such as birdwatching, whale watching, etc. Issues and product development needs/opportunities related to these product categories are not included in this section.

Note that the review of existing studies and research revealed very little information on this product category.

MARKET READINESS ISSUES

- Existing product development is limited - while there are natural phenomenon in the province, interpretive facilities and literature are limited

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- No major challenges or costs

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- See discussion under Bay of Fundy Nature Product for product development needs/opportunities specifically related to this area
- Consideration must be given the protection of the resource and its capacity for visitation/use

PRODUCT: CYCLING					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May -Oct visitor levels* • *Ont/Que data is for "other Canadians"*	2.0% participation rate; 13,300 persons **Score: 1**	3% participation rate; 10,100 persons **Score: 1**	3% participation rate; 2,300 persons **Score: 1**	4% participation rate 6,900 persons **Score: 1**	6% participation rate 2,000 persons **Score: 1**
Visitor Satisfaction Levels • *Data from 1997 NS Conversion Study: % saying "cycling" is much better than elsewhere:*	20% **Score : 2**	21% **Score: 2**	33% **Score: 3**	New England: 20% Mid Atlantic: 25% **Score: 2**	N/A
Potential Market Size • *Data is from 1997 Conversion Study: % saying " cycling" was important to decision to visit most recent vacation destination* • *Applied to total person trips from the market, to or within Canada (inter-prov'l)* • *European data is participation in cycling on all trips to Canada; based on CTC Pleasure Travel Market Studies for UK & Germany*	11% Potential Market: 179.6 thousand person trips **Score: 1**	12% Potential Market: 420.9 thousand person trips **Score: 2**	28% Potential Market: 536.8 thousand person trips **Score: 2**	14% Potential Market: 569.7 thousand person trips **Score: 3**	10.6% Potential Market: 245,000 thousand person trips **Score: 1**
Role as a Travel Motivator • *Data is from 1997 Conversion Study: % saying "cycling" was important to decision to visit most recent vacation destination*	11% **Score: 2**	12% **Score: 2**	28% **Score: 3**	14% **Score: 2**	N/A
Role as a Demand Supporter • *Comments are subjective*	Of limited importance for the touring market, as evidenced by low-moderate participation rates and motivation; somewhat more important to the Quebec market No potential for meetings and incentive travel market, or urban destination market Very limited potential to contribute to vacation destination market				

	PRODUCT: CYCLING				
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
Growth Potential • *Data from CTC Adventure Tourism Study and Canadian Physical Fitness Monitor; also US Forest Service Study*	Data is mixed - CTC Adventure Tourism Study suggests increase of 82% over five years; Physical Fitness Monitor says increase in participation rate from 31% to 47% between 1981 and 1997, and US Forest Service indicates increase of 1.6% in number of participants from '82 to '94 which is a net decline after population growth. Estimated **Score 2** for all markets.				Estimated at same score as North America
Multi-Season Potential - Shoulder • *Comments are subjective*	Moderate potential to contribute to generating trips in late spring and early fall when weather is more moderate; less potential from New England market because of competing opportunities in New England, where fall is a strong season				
Multi-Season Potential - Nov to April • *Comments are subjective*	No Potential - weather generally not suitable				
PRODUCT CRITERIA					
Current Unique Selling Proposition	Nova Scotia known for offering a unique cycling product. Cycling tours to NS offered by a number of major tour operators selling cycling product. Offers some unique cycling experiences such as Cabot Trail and coastal routes. Experience in NS reportedly preferred to that available in NB and PEI. However, support infrastructure is not in place, quality of secondary roads is deteriorating and need for enhanced level of market-readiness.				
Latent Resource Quality/Potential	Nova Scotia has resource potential for "world class" cycling - variety of landscapes, coastal experiences, Cabot Trail, basic infrastructure, network of secondary roads many of them along the coast, different types of cycling experiences, friendly people				
Constraints to Growth	No major constraints to growth				

REGIONAL SCORES

Cycling	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	2	3	3	3	1	1	1	
Latent Resource Quality	3	4	3	3	2	2	3	
Constraints to Growth	3	3	3	3	2	2	2	
Percent of Perfect Score	52%	66%	60%	60%	32%	32%	38%	

REGIONAL COMMENTS

Cape Breton
Cabot Trail has good USP for cycling and offers the best cycling experience in the province. Other parts of Cape Breton not as good - poor roads, industrial, little infrastructure

Resource of Cabot Trail and National Park are excellent quality for cycling. Also Bras d'Or Lakes area. No major constraints to further development.

South Shore
One of the more established cycling areas in the province, Lunenburg area is particularly strong.

Area has lots of amenities and infrastructure, network of secondary roads, coastal landscapes - good quality resources for cycling. No major constraints to further development.

Annapolis Valley
Also an established cycling destination - offering a different experience than other parts of the province.

Resources are generally good quality for further development of product although lack of coastal roads is a limiting factor. Enjoys good amenities, infrastructure, secondary roads, variety of landscapes. No major constraints to further development

Eastern Shore
Not well established for cycling - limited amenities and infrastructure with long distances between communities, poor road conditions.

Potential for further development limited by nature of settlement in this area but natural resources - coastal roads and scenery are appealing for cyclists

Northumberland Shore
Not well established for cycling at present.

Area has some latent potential - good mix of amenities, network of secondary roads although landscapes and coastal opportunities not as extensive as some other parts of the province

Fundy Shore
Not well established for cycling - limited amenities and infrastructure with long distances between communities, poor road conditions.

Potential for further development limited by nature of development in this area but natural resources - coastal roads and scenery are appealing for cyclists

Halifax Urban Area N/A

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:
Cycling

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL POINTS (Excl. Europe)**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	
Current Visitation to NS May to Oct 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	1	3	1	6	1	6	1	9	1	12	24
Visitor Satisfaction Levels	3	2	6	2	12	3	18	2	18		0	54
Potential Market Size	5	1	5	2	20	2	20	2	30	1	20	75
Role of the Product as a Travel Motivator	5	2	10	2	20	3	30	2	30		0	90
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	1	1.25	1	2.5	2	5	1	3.75	1	5	13
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential	4	2	8	2	16	2	16	2	24	2	32	64
Multi-Season Potential												
Shoulder Season (May/June, Sept/Oct)	5	2	10	2	20	2	20	1	15	2	40	65
November to April	5	0	0	0	0	0	0	0	0	0	0	0
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*33*	**43.8**	*33*	**97.5**	*33*	**116.0**	*33*	**131.3**	*25*	**111.0**	**389**
Score as % of a Perfect Score			27%		30%		35%		27%		22%	29%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	2	15	2	30	2	30	2	45	2	60	120
Latent Resource Quality/Potential	6	3	18	3	36	3	36	3	54	3	72	144
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		*19.5*	**51.0**	*19.5*	**102.0**	*19.5*	**102.0**	*19.5*	**153.0**	*19.5*	**204.0**	**408**
Score as % of a Perfect Score			52%		52%		52%		52%		52%	52%
TOTAL: MARKET AND PRODUCT CR!TERIA		**52.5**	**95**	**52.5**	**200**	**52.5**	**218**	**52.5**	**284**	**44.5**	**315**	**797**
Score as % of a Perfect Score			36%		38%		42%		36%		35%	38%

NOTES:

CYCLING

MARKET READINESS ISSUES

- Condition of roads - narrow secondary roads with no shoulders, heavy traffic in some areas and poor quality pavement
- Support services are limited such as repair shops, transportation within province (unless on an organized trip), accommodations that are welcoming to cyclists and have suitable facilities (storage, supplies, etc.)
- Off-road trails are very limited (for mountain biking and regular cycling) - rails to trails initiative is improving this but nowhere near market ready yet

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- No major challenges

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Shoulders on roads in popular touring areas or alternative trails (rails to trails)
- Encourage "cyclist-friendly" accommodations and campgrounds
- Driver education on responding to cyclists on roads

PRODUCT: SEA KAYAKING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May -Oct visitor levels on participation in sea kayaking/canoeing* • *Ont/Que data is for "other Canadians"*	1.0% participation rate; 6,600 persons **Score: 1**	2% participation rate; 6,700 persons **Score: 1**	2% participation rate; 1,540 persons **Score: 1**	3% participation rate 5,200 persons **Score: 1**	10% participation rate 3,500 persons Score: 1
Visitor Satisfaction Levels • *Data from 1997 NS Conversion Study; % saying "sea kayaking/canoeing" is much better than elsewhere;*	46% **Score : 4**	25% **Score: 2**	20% **Score: 2**	New England: 18% Mid Atlantic: 38% **Score: 2**	N/A
Potential Market Size • *Data is from 1997 Conversion Study; % saying " kayaking or canoeing" was important to decision to visit most recent vacation destination* • *Applied to total person trips from the market, to or within Canada (inter-prov'l)*	13% Potential Market: 212.2 thousand person trips **Score: 1**	10% Potential Market: 350.8 thousand person trips **Score: 2**	11% Potential Market: 210.9 thousand person trips **Score: 1**	10.2% Potential Market: 415 thousand person trips **Score: 2**	N/A
Role as a Travel Motivator • *Data is from 1997 Conversion Study; % saying "kayaking/canoeing" was important to decision to visit most recent vacation destination*	13% **Score: 2**	10% **Score: 2**	11% **Score: 2**	10.2% **Score: 2**	N/A
Role as a Demand Supporter • *Comments are subjective*	Of limited importance for the touring market, as evidenced by low participation rates and low-moderate role as a travel motivator No potential for meetings and incentive travel market, or urban destination market Some potential to contribute to vacation destination market				
Growth Potential • *National Sporting Goods Association*	Increase in participation of 9% between 1993 and 1998 (US data) **Score: 2** for all markets				Estimated at same score as North America

PRODUCT: SEA KAYAKING					
CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Multi-Season Potential - Shoulder • *Comments are subjective*	Moderate potential to contribute to generating trips in late spring and early fall when weather is more moderate; less potential from New England market				
Multi-Season Potential - Nov to April • *Comments are subjective*	No Potential - weather not suitable				
PRODUCT CRITERIA					
Current Unique Selling Proposition	Nova Scotia well established as a sea kayaking destination with a few well-known operators offering quality experiences. One of the top 2 or 3 destinations in Canada for this activity.				
Latent Resource Quality/Potential	Province has excellent natural resources for sea kayaking - sheltered coastlines, islands, uncrowded, marine life, accessible coastline for departure points. Weather conditions can be a challenge - fog, winds, storms				
Constraints to Growth	Very few, if any constraints; potentially some conflicts with coastal land ownership				

NB: Data on visitor market size, satisfaction levels, potential market size and role as a travel motivator is based on data for kayaking/canoeing combined and may not accurately reflect the situation with respect to sea kayaking.

REGIONAL SCORES

Sea Kayaking	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	3	3	3	1	2	4	1	
Latent Resource Quality	4	4	4	1	3	4	1	
Constraints to Growth	4	4	4	2	2	4	2	
Total Score as a % of a Perfect Score	72%	72%	72%	26%	46%	80%	26%	

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:

Sea Kayaking

(NB: Much of the data is for kayaking/canoeing)

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	POINTS (Excl. Europe)
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size (kayaking/canoeing)	3	1	3	1	6	1	6	1	9	1	12	24
Visitor Satisfaction Levels (kayaking/canoeing)	3	4	12	2	12	2	12	2	18		0	54
Potential Market Size (kayaking/canoeing)	5	1	5	2	20	1	10	2	30		0	65
Role of the Product as a Travel Motivator (kayaking/canoeing	5	2	10	2	20	2	20	2	30		0	80
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	1	1 25	1	2 5	1	2 5	1	3 75	1	5	10
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0 5	2	1	2	2	2	2	2	3	2	4	8
Growth Potential (kayaking)	4	2	8	2	16	2	16	2	24	2	32	64
Multi-Season Potential												
Shoulder Season (May/June, Sept/Oct)	5	2	10	2	20	2	20	1	15	2	40	65
November to April	5	0	0	0	0	0	0	0	0	0	0	0
Market Awareness- NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*33*	**50.3**	*33*	**98.5**	*33*	**88.5**	*33*	**132.8**	*20*	**93.0**	**370**
Score as % of a Perfect Score			30%		30%		27%		27%		23%	28%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22 5	3	45	3	45	3	67 5	3	90	180
Latent Resource Quality/Potential	6	4	24	4	48	4	48	4	72	4	96	192
Product Potential - Constraints/Capacity for Growth	6	4	24	4	48	4	48	4	72	4	96	192
Sub total: Product Related Criteria		*19.5*	**70.5**	*19.5*	**141.0**	*19.5*	**141.0**	*19.5*	**211.5**	*19.5*	**282.0**	**564**
Score as % of a Perfect Score			72%		72%		72%		72%		72%	72%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**121**	**52.5**	**240**	**52.5**	**230**	**52.5**	**344**	**39.5**	**375**	**934**
Score as % of a Perfect Score			46%		46%		44%		44%		47%	44%

NOTES:

14/01/00

REGIONAL COMMENTS

Cape Breton
Some existing product on Bras D'Or Lakes and extended trips around the coast but limited compared to other parts of the province - for experienced kayakers

Bras D'Or Lakes is a quality natural resource for sea kayaking - sheltered bays, scenery, etc. Some protected harbours such as Louisbourg, Garbarus but not as many off-shore islands as Eastern/South. Cold water and fog on east coast; west coast is warmer.

Constraints include weather conditions, need to be experienced for coastal areas.

South Shore
Some areas of South Shore are well established for sea kayaking, e.g. Mahone Bay area, Blue Rocks, Le Have Islands, and also offer excellent natural resource for this activity - islands, sheltered waters, infrastructure

Other areas offer excellent natural resources for kayaking - e..g Tusket Islands; generally easily accessible with basic infrastructure for supplies, etc.

Coastal Trail project also has some potential for sea kayaking product.

Constraints include weather, strong winds, currents in some areas

Annapolis Valley
Not an established region for sea kayaking; tides, fog and lack of islands and sheltered waters make this area much less appealing than other parts of the province for this activity.

Resource quality/character is a constraint to future growth.

Eastern Shore
Strongest USP in the province due to quality of resource and location/efforts of major operator.

Natural resources of Eastern Shore, particularly islands of the Eastern Shore Archipelago, are excellent quality for sea kayaking - islands, sheltered waters, few people

Very little in the way of constraints to future growth

Northumberland Shore
Not an established region for sea kayaking; lack of islands and sheltered waters make this area much less appealing than other parts of the province for this activity.

Resource quality/character is a constraint to future growth.

Fundy Shore
Area currently has more limited USP than some other regions.

Natural resources offer good potential - some islands, unique land/rock formations, tidal flats. Also, spectacular scenery particularly in Cape Chignecto area. Not a well-established region for sea kayaking; tides, fog, cold water, strong currents and lack of islands and sheltered waters make this area less appealing than some other parts of the province for this activity.

Resource quality/character is a constraint to future growth.

Halifax Urban Area N/A

SEA KAYAKING

MARKET READINESS ISSUES

- Appears to be reasonable quantity of operators overall
- Quality of experience, guiding and skill level of operators inconsistent

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Protection of access to coastal lands/resources for day and overnight visits

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Establish near shore marine parks with basic infrastructure for sea kayakers - campsites, launching area, pit toilets (Eastern Shore Archipelago, Blue Rocks area, La Have Islands, Tusket Islands, Port Mouton area)
- Establish "loop" sea kayaking trails designed for day and multi-day trips with basic infrastructure - build on Coastal Trail concept now underway but create mini-destinations rather than a linear route. Possible areas include Port Mouton, Whitehead/Canso, Economy/Five Islands, Prospect/Terence Bay
- Continue efforts to establish, and then promote and package, the Coastal Water Trail
- Establish quality assurance initiatives for operators - possibly some form of certification and code of ethics; minimum standards/training for entry

PRODUCT: SCENERY - NATURAL AND CULTURAL

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May -Oct visitor levels; participation in sightseeing* • *Ont/Que data is for "other Canadians"*	50.0% participation rate; 332,400 persons **Score: 5**	74% participation rate; 249,800 persons **Score: 5**	74% participation rate; 56,900 persons **Score: 3**	82% participation rate 141,200 persons **Score: 4**	76% participation rate 26,400 persons **Score: 2**
Visitor Satisfaction Levels • *Data from 1997 NS Conversion Study; % saying "sightseeing" is much better than elsewhere;* • *European data is based on NS Air Accord Research; satisfaction rating*	35% **Score : 3**	35% **Score: 3**	34% **Score: 3**	New England: 42% Mid Atlantic: 26% **Score: 3**	Survey Results 3.6 out of 4 **Score: 4**
Potential Market Size • *Data is from 1997 Conversion Study; % saying " sightseeing" was important to decision to visit most recent vacation destination; Applied to total person trips from the market, to or within Canada* • *European score is based on NS Air Accord Research; importance of sightseeing*	85% Potential Market: 1.39 million person trips **Score: 3**	89% Potential Market: 3.1 million person trips **Score: 5**	86% Potential Market: 1.65 million person trips **Score: 3**	87% Potential Market: 3.55 million person trips **Score: 5**	Survey Results 3.6 out of 4 **Score: 4**
Role as a Travel Motivator • *Data is from 1997 Conversion Study; % saying "sightseeing" was important to decision to visit most recent vacation destination*	85% **Score: 5**	89% **Score: 5**	86% **Score: 5**	87% **Score: 5**	**Estimate Score: 4**
Role as a Demand Supporter • *Comments are subjective*	Very important, if not critical for the touring market, particularly those form outside Atlantic Canada Of some interest to the meetings and incentive travel market. More limited importance to the urban destination market. Important contributing factor to the vacation destination market.				

PRODUCT: SCENERY - NATURAL AND CULTURAL					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
Growth Potential • *Data from US Forest Service Study: Increase in number of participants 1982-1994*	Increase in number of participants in sightseeing of 39.5% between 1982 and 1994; **Score:** 4 for all markets				Estimated at same score as North America
Multi-Season Potential - Shoulder • *Comments are subjective*	Product is strong in the spring and extremely strong in the fall months and a major factor in generating travel throughout this period				
Multi-Season Potential - Nov to April • *Comments are subjective*	Scenery has reasonable appeal throughout the year, although potential in November to April is limited by weather conditions				
PRODUCT CRITERIA					
Current Unique Selling Proposition	Nova Scotia has a strong competitive advantage and USP with respect to its natural scenery based around the sea coast, Cabot Trail; also known for its cultural scenery, most notably Peggy's Cove				
Latent Resource Quality/Potential	Nova Scotia's scenic resources are of very high quality; cultural heritage as evidenced in small fishing villages, heritage communities, architecture, etc. is also high quality and appealing				
Constraints to Growth	Concerns about deterioration in natural environment due to things such as clear cutting, urban sprawl, signage, and development along coastline, all of which have some impact on potential for growth of a quality product				

REGIONAL SCORES

Scenery - Natural and Cultural	**Average Prov'l Score**	**Cape Breton**	**South Shore**	**Annapolis Valley**	**Fundy Shore**	**Eastern Shore**	**Northumb. Shore**	**Halifax Urban**
		Score	Score	Score	Score	Score	Score	Score
Current USP	4	5	4	2	3	3	2	▨
Latent Resource Quality	4	5	4	2	5	4	3	▨
Constraints to Growth	3	3	4	3	3	2	4	▨
Total Score as a % of a Perfect Score	74%	88%	80%	46%	72%	60%	58%	▨

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:

Scenery: Natural & Cultural

(NB: Most data is based on sightseeing)

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	**POINTS**
Current Visitation to NS: May to Oct 1998		664,813		337,549		77,002		172,231		34,786		**(Excl.**
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		**Europe)**
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	5	15	5	30	3	18	4	36	2	24	99
Visitor Satisfaction Levels	3	3	9	3	18	3	18	3	27	4	48	72
Potential Market Size	5	3	15	5	50	3	30	5	75	4	80	170
Role of the Product as a Travel Motivator	5	5	25	5	50	5	50	5	75	4	80	200
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	4	5	5	12.5	5	12.5	5	18.75	5	25	49
- Meetings and Incentive Travel Market	0.75	2	1.5	2	3	2	3	2	4.5	2	6	12
- Urban Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
- Vacation Destination Market	0.5	4	2	4	4	4	4	4	6	4	8	16
Growth Potential	4	4	16	4	32	4	32	4	48	4	64	128
Multi-Season Potential												
Shoulder Season (May/June, Sept/Oct)	5	5	25	5	50	5	50	5	75	5	100	200
November to April	5	2	10	2	20	2	20	2	30	2	40	80
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*33*	**124.0**	*33*	**270.5**	*33*	**238.5**	*33*	**396.8**	*33*	**477.0**	1030
Score as % of a Perfect Score			75%		82%		72%		80%		72%	78%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	4	30	4	60	4	60	4	90	4	120	240
Latent Resource Quality/Potential	6	4	24	4	48	4	48	4	72	4	96	192
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		*19.5*	**72.0**	*19.5*	**144.0**	*19.5*	**144.0**	*19.5*	**216.0**	*19.5*	**288.0**	576
Score as % of a Perfect Score			74%		74%		74%		74%		74%	74%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**196**	**52.5**	**415**	**52.5**	**383**	**52.5**	**613**	**52.5**	**765**	**1606**
Score as % of a Perfect Score			75%		79%		73%		78%		73%	76%

NOTES:

COMMENTS ON REGIONAL SCORES:

Cape Breton
Outstanding natural and cultural scenery; also has high market recognition for scenery - e.g. Conde Nast rating as of the best islands in the world; Grosvenor (Nat'l Geographic) comments

Good potential on the north side but capacity is a constraint; on south side, product quality is not as strong

South Shore
Has a strong cultural scenery to complement the natural scenery, though natural scenery is not as strong as other parts of the province

Urban sprawl, population growth, private ownership of coastal lands is negatively impacting potential, particularly down as far as Bridgewater. More future opportunity/potential west of Bridgewater - scenic quality, cultural variety

Annapolis Valley
Scenery (nature and cultural) is not as strong or as diverse, nor is it as readily accessible/visible to the touring market; Quality scenery is more in pockets than throughout the whole area.

Bay of Fundy area has the potential to become an icon for the province - British AAA guide rates the Bay of Fundy as one of the world's best natural areas.

Eastern Shore
Natural scenery is generally good quality though not as dramatic as some other regions; good coastal views and vistas; Cultural scenery not as strong or diverse as some other regions.

Good potential to enhance scenic appeal for the touring market, building on coastal scenery, less populated/travelled area, deserted beaches, etc.

Northumberland Shore
Cultural and natural scenery not as diverse or dramatic as other regions - some quality "pockets" such as George's Bay, Tony River, but it is not distributed throughout the region

Heritage/industrial culture has future potential and efforts are already underway to develop a Heritage Tour in this region.

Fundy Shore
Quality natural scenery and vistas; cultural scenery not as strong or diverse

Bay of Fundy has the potential to become an icon for the province - British AAA guide rates the Bay of Fundy as one of the world's best natural areas;

Halifax Urban Area
Cultural scenery has some appeal but much more limited than other regions

SCENERY - NATURAL & CULTURAL

MARKET READINESS ISSUES

- Extensive amount of high quality natural scenery available throughout the province
- Range of cultural scenery, architectural heritage, etc. available but not identified as such

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Continued and increasing development pressures, particularly in popular coastal areas, could have significant negative long term impact on quality of Nova Scotia's natural scenery, and ability for visitors to experience it.
- Tourism needs to have a stronger voice in dealing with competing resource demands, such as clear cutting.
- Littering, particularly "dumping" in the woods and unsightly properties an increasing concern
- Proliferation of highway advertising signage has negative impact on scenic environment
- Protection of built resources such as heritage architecture, streetscapes, fishing communities, etc.

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- More scenic look-offs/pull overs along Travelways
- Upgrade highway conditions, particularly secondary highways that are designated travelways/scenic routes
- Maintaining scenic views and vistas - impact of activities such as clearcutting, proliferation of signage, etc.
- Consider "No sign" zones for designate scenic areas, zones or routes
- Give added emphasis to the promotion of Nova Scotia's most scenic touring routes
- Identification/interpretation of locations with quality heritage architecture, also the cultural scenery of the province to encourage distribution of visitation to less popular areas (Interpretive guide for tourist routes including interpretation of landscapes is currently in progress)

PRODUCT: CANOEING					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May -Oct visitor levels for participation in canoeing/kayaking* • *Ont/Que data is for "other Canadians"*	1.0% participation rate; 6,600 persons **Score: 1**	2% participation rate; 6,700 persons **Score: 1**	2% participation rate; 1,500 persons **Score: 1**	3% participation rate 5,100 persons **Score: 1**	10% participation rate 3,500 persons **Score: 1**
Visitor Satisfaction Levels • *Data from 1997 NS Conversion Study: % saying " canoeing/kayaking" is much better than elsewhere; Small sample sizes*	46% **Score : 4**	25% **Score: 2**	20% **Score: 2**	New England: 18% Mid Atlantic: 38% **Score: 2**	N/A
Potential Market Size • *Data is from 1997 Conversion Study; % saying " canoeing/kayaking" was important to decision to visit most recent vacation destination* • *Applied to total person trips from the market, to or within Canada (inter-prov'l)*	13% Potential Market: 212.3 thousand person trips **Score: 1**	10% Potential Market: 350.8 thousand person trips **Score: 2**	11% Potential Market: 210.8 thousand person trips **Score: 1**	10.2% Potential Market: 415 thousand person trips **Score: 2**	N/A
Role as a Travel Motivator • *Data is from 1997 Conversion Study; % saying "canoeing/kayaking" was important to decision to visit most recent vacation destination*	13% **Score: 2**	10% **Score: 2**	11% **Score: 2**	10.2% **Score: 2**	N/A
Role as a Demand Supporter • *Comments are subjective*	Very limited potential to contribute to the touring market, as evidenced by low participation rates and low-moderate role as a travel motivator; No potential for meetings and incentive travel market, or urban destination market Very limited potential to contribute to vacation destination market				
Growth Potential • *Based on data from National Sporting Goods Association*	Increase in participation of 9% from 1993 to 1998 in US; used as basis for all markets **Estimated Score: 2**				Estimated at same score as North America

PRODUCT: CANOEING					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
Multi-Season Potential - Shoulder • *Comments are subjective*	Some limited potential to contribute to generating trips in late spring and early fall when weather is more moderate; moreso from close by Atlantic Canada market and European market with interest in outdoor products Also, canoeing experience is better in spring/fall with higher water levels				
Multi-Season Potential - Nov to April • *Comments are subjective*	No Potential - weather conditions not suitable				
PRODUCT CRITERIA					
Current Unique Selling Proposition	Nova Scotia not recognized as a canoeing destination - as not been promoted as such; Kejimkujik has some recognition in the regional market, and increasingly outside of the region				
Latent Resource Quality/Potential	Some areas with good resource potential, including Kejimkujik, Tobeatic Wilderness area, Tangier Grand, White's Lake in Eastern Shore and other rivers that interconnect with coastal canoeing/kayaking opportunities. Resource for coastal kayaking is much stronger; Problems with volume of water in rivers limits potential, particularly in summer months - tends to be local/regional use in spring and fall when there is enough water. N whitewater canoeing resource - more appeal for recreational/family canoeing. Coastal areas are where potential is - see discussion under kayaking.				
Constraints to Growth	Resource quality (quantity of water) for inland waterways/rivers is a significant constraint.				

NB: **Data on visitor market size, satisfaction levels, potential market size and role as a travel motivator is based on data for kayaking/canoeing combined and may not accurately reflect the situation with respect to canoeing.**

REGIONAL SCORES

Canoeing	**Average Prov'l Score**	**Cape Breton**	**South Shore**	**Annapolis Valley**	**Fundy Shore**	**Eastern Shore**	**Northumb. Shore**	**Halifax Urban**
		Score	Score	Score	Score	Score	Score	Score
Current USP	2.1	1	1	3	0	2	0	
Latent Resource Quality	3	2	2	4	0	4	0	
Constraints to Growth	3	3	3	3	0	3	0	
Percent of Perfect Score	53%	38%	38%	66%	0%	58%	0%	

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:

Canoeing

(NB: Much of the data is for sea kayaking/canoeing)

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL POINTS (Excl. Europe)**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	**Weight**	**Score**	**Points**	**Score**	**Points**	**Score**	**Points**	**Score**	**Points**	**Score**	**Points**	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size (canoeing/kayaking)	3	1	3	1	6	1	6	1	9	1	12	24
Visitor Satisfaction Levels (canoeing/kayaking)	3	4	12	2	12	2	12	2	18		0	54
Potential Market Size (canoeing/kayaking)	5	1	5	2	20	1	10	2	30		0	65
Role of the Product as a Travel Motivator (canoeing/kayaking)	5	2	10	2	20	2	20	2	30		0	80
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	1	1.25	1	2.5	1	2.5	1	3.75	1	5	10
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential (canoeing only)	4	2	8	2	16	2	16	2	24	2	32	64
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	2	10	1	10	1	10	1	15	2	40	45
November to April	5	0	0	0	0	0	0	0	0	0	0	0
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*33*	**49.8**	*33*	**87.5**	*33*	**77.5**	*33*	**131.3**	*20*	**91.0**	**346**
Score as % of a Perfect Score			30%		27%		23%		27%		23%	26%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	2	30	2	30	2	45	2	60	128
Latent Resource Quality/Potential	6	3	18	3	36	3	36	3	54	3	72	144
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		*19.5*	**58.5**	*19.5*	**102.0**	*19.5*	**102.0**	*19.5*	**153.0**	*19.5*	**204.0**	**416**
Score as % of a Perfect Score			60%		52%		52%		52%		52%	53%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**108**	**52.5**	**190**	**52.5**	**180**	**52.5**	**284**	**39.5**	**295**	**762**
Score as % of a Perfect Score			41%		36%		34%		36%		37%	36%

NOTES:

REGIONAL COMMENTS

Cape Breton
Bras d'Or Lakes offers some good potential - wildlife, natural, sheltered waters

A few rivers/lakes with some limited potential, mostly for local/regional market use

South Shore
Very little product/potential - resources not suitable

Annapolis Valley
Best area in the province for canoeing - with Kejimkujik which is only area with developed infrastructure and support services; excellent future potential in the Tobeatic Wildlife Reserve but not market ready at present

Eastern Shore
Existing product is limited although natural resources are there - Tangier Grand area which links into coastal canoeing/kayaking opportunities; also White's Lake area

Northumberland Shore
Very little product/potential - no suitable resources

Fundy Shore
Very little product/potential - no suitable resources

Halifax Urban Area N/A

CANOEING

MARKET READINESS ISSUES

- Nova Scotia has a quality resource for canoeing but market readiness and product delivery mechanisms are not in place with the exception of Kejimkujik National Park
- Need for guiding businesses, basic infrastructure and management plans/systems in areas that are not yet established for canoeing, such as the Tobeatic Wilderness, Tangier Grand Wilderness Area on Eastern Shore
- Limited support infrastructure available in these areas as well - e.g. accommodations, restaurants, campgrounds, etc.

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Kejimkujik, which has the best resource and most potential, is running close to capacity for back country canoeing but it is mostly local use
- Some opposition to development by local/regional residents who want areas for their own use
- Little available capital funding for infrastructure development
- Conflict with local residents - concern over development of areas for visitor markets
- Access to capital funding for basic infrastructure

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Basic infrastructure development and management plans in areas with potential, such as Tobeatic and Tangier-Grand, Salmon River-Whites Lake Wilderness area;
- Encourage establishment of guiding businesses in these areas that offer good quality canoeing
- Recognition that there is potential for canoeing, although potential is more limited on inland rivers and lakes than in coastal areas because of water quantity/quality - need to identify rivers/areas where there is potential and market them

PRODUCT: SCUBA/SHIPWRECK DIVING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from NS Marine Tourism Study consumer survey; data for Canadians and US*	2.0% participation rate; 13,300 persons **Score: 1**	2% participation rate 1,540 persons **Score: 1**	2% participation rate 6,750 persons **Score: 1**	1% participation rate 1,700 persons **Score: 0**	**Estimated** **Score: 1**
Visitor Satisfaction Levels • *Data from NS Marine Tourism Study ; % saying " scuba diving" is much better than elsewhere. Small sample.*	Canadian Market: 20% **Score : 2**			US Market: 0 **Score: 0**	Based on NS Marine Study interviews Score: 2
Potential Market Size • *Based on number of certified Scuba Divers and estimate of proportion who travel for diving (from specialty magazine surveys)*	Potential Market: 3,750 persons **Score: 0**	Potential Market: 20,000 persons **Score: 1**	Potential Market: 15,000 persons **Score: 1**	Potential Market: 210,000 persons **Score: 1**	Potential Market: 97,300 persons Score: 1
Role as a Travel Motivator • *Based on survey for DEMA (Diving Equipment and Marketing Association)*	Survey suggested 56% of divers travel up to 1,000 miles to dive; data is based on all divers most of whom are warm water; estimated that 20% of divers are potential cold water divers and this was used as basis to estimate score. **Score: 1** for all NA markets.				N/A
Role as a Demand Supporter • *Comments are subjective*	Highly specialized activity; therefore not likely to be a demand supporter for any trip type other than, to a very limited extent, the vacation destination market				
Growth Potential	30,000 new divers a year in Canada; certifications expected to grow at 15% a year for next several years			600,000 new divers a year in US; 15% growth per year in certifications	Estimate based on US experience
Multi-Season Potential - Shoulder • *Comments are subjective*	Some limited potential to generate trips in spring/fall from close-by market; less so from further away Canadian markets and not at all from US market because of lower level of interest in cold water diving; However, European market more accustomed to cold water diving so some limited potential here.				
Multi-Season Potential - Nov to April • *Comments are subjective*	No potential - weather and resource conditions not suitable				

PRODUCT: SCUBA/SHIPWRECK DIVING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Nova Scotia's position as a location for diving is strong in the regional marketplace, but less so in further away markets. Competitive position as a diving destination is improving with increased marketing, coverage in specialty magazines and new appeals such as the Saguenay in Lunenburg. Higher profile among the dive community in Great Britain and Europe than in the US because of acceptance of cold water dive conditions.				
Latent Resource Quality/Potential • *Comments are subjective*	Nova Scotia has excellent resources for SCUBA and shipwreck diving - wrecks, marine life, clear water, diversity of opportunities, good road access, outstanding underwater scenery, etc. However, the water is cold, thereby limiting its potential in this market, which generally prefers warm water diving areas. Resource quality is highest for the Atlantic Canada market with Nova Scotia offering some of the best, most accessible diving in the region. Quality is lower for other markets, particularly the US, because of the cold water issue.				
Constraints to Growth • *Comments are subjective*	No major constraints to growth though have to deal with issue of protecting the resource against scavenging and potential development of artificial dive sites.				

REGIONAL SCORES

Shipwreck Diving/SCUBA	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	2.8	3	3	0	0	1	0	3
Latent Resource Quality	2.8	4	3	1	1	2	1	4
Constraints to Growth	3	3	3	2	2	2	2	3
Total Score as a % of a Perfect Score	57%	66%	60%	19%	19%	32%	19%	66%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY
PRODUCT:
Shipwreck Diving, SCUBA, Marine Parks

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	POINTS
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		(Excl.
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		Europe)
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	1	3	1	6	1	6	0	0	1	12	15
Visitor Satisfaction Levels	3	2	6	2	12	2	12	0	0	2	24	30
Potential Market Size	5	0	0	1	10	1	10	1	15	1	20	35
Role of the Product as a Travel Motivator	5	1	5	1	10	1	10	1	15	1	20	40
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	0	0	0	0	0	0	0	0	0	0	0
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential	4	2	8	2	16	2	16	2	24	2	32	64
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	2	10	1	10	1	10	0	0	1	20	30
November to April	5	0	0	0	0	0	0	0	0	0	0	0
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		33	**32.5**	33	**65.0**	33	**65.0**	33	**55.5**	33	**130.0**	**218**
Score as % of a Perfect Score			20%		20%		20%		11%		20%	17%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	4	30	3	45	3	45	2	45	3	90	165
Latent Resource Quality/Potential	6	4	24	3	36	3	36	2	36	3	72	132
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		19.5	**72.0**	19.5	**117.0**	19.5	**117.0**	19.5	**135.0**	19.5	**234.0**	**441**
Score as % of a Perfect Score			74%		60%		60%		46%		60%	57%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**105**	**52.5**	**182**	**52.5**	**182**	**52.5**	**191**	**52.5**	**364**	**659**
Score as % of a Perfect Score			40%		35%		35%		24%		35%	31%

NOTES:

REGIONAL COMMENTS

Cape Breton
Cape Breton waters, including Louisbourg harbour, have moderate USP for diving. Also some recognition of off-shore islands, Scatarie Island and Bird Island for diving.

Excellent shipwreck resources around Cape Breton but accessibility and rough weather are constraints to further development

South Shore
Lunenburg area has USP for diving due to Saguenay but more limited recognition of this product in rest of the area

Area has range of shipwreck resources as well as accessible, clear waters for diving.

No major constraints to further development

Annapolis Valley
No current USP and limited resource potential

Eastern Shore

Current USP very limited;

Some resources, e.g. Port Bickerton area, but not as extensive as other regions and not as accessible.

Northumberland Shore
No current USP and limited resource potential

Fundy Shore
No current USP and limited resource potential

Halifax Urban Area
Probably best established diving area in the province with a number of sites within easy accessibility

Extensive, quality resources available in the general Halifax area, e.g. Sambro, Chebucto Head area,

No major constraints to further development other than weather conditions

SHIPWRECK DIVING/SCUBA

MARKET READINESS ISSUES

- Province has some excellent quality resources for diving
- Charter dive boats and support services not always of appropriate quality and in the right place
- Little in the way of packages for diving, including dive experience, boats, accommodations, meals, transportation

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Resource management/protection of dive sites to prevent scavenging and ensure protection of the resource
- Availability of trained dive boat operators
- Cold water conditions limit the appeal of NS for diving

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Identify/catalogue best dive sites and develop a comprehensive information package and guide book with site listings and maps (already done?)
- Identify sites needing protection and implement resource management efforts - enforce Special Places Protection Act
- Establish additional artificial reef dive attractions - St. Margaret's Bay, Port Mouton
- Develop comprehensive, all-inclusive dive packages
- Additional dive shop facilities closer to dive sites
- Establish Marine Parks/Protected Areas, e.g. in Port Mouton area
- Education of boat operators on how to deal with divers, safety, resource management and protection
- Enhanced education of local divers re protection of the resource

PRODUCT: BIRD WATCHING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels* • *Ont/Que data is for "other Canadians*	4% participation rate; 26,600 persons **Score: 2**	12% participation rate; 40,500 persons **Score: 2**	12% participation rate; 9,200 persons **Score: 1**	24% participation rate 41,300 persons **Score: 2**	22% participation rate 7,600 persons **Score: 1**
Visitor Satisfaction Levels • *Data from NS Conversion Study; % saying "birdwatching" is much better than elsewhere*	29% **Score : 2**	25% **Score: 2**	15% **Score: 1**	New England: 25% Mid Atlantic: 36% **Score: 2**	N/A
Potential Market Size • *Data is from 1997 Conversion Study; % saying "bird watching" was important to decision to visit most recent vacation destination; Applied to total person trips from the market, to or within Canada (inter-provincial)* • *European data taken from CTC Pleasure Travel Markets Studies for UK & Germany; % participating on trip to Canada*	16% Potential Market: 261.3 thousand person trips **Score: 1**	19% Potential Market: 666.5 thousand person trips **Score: 2**	33% Potential Market: 632.6 thousand person trips **Score: 2**	20% Potential Market: 813.8 thousand person trips **Score: 2**	69% Potential Market (France, Germany & UK): 1.6 million person trips **Score: 3**
Role as a Travel Motivator • *Data is from 1997 Conversion Study; % saying "bird watching" was important to decision to visit most recent vacation destination*	16% **Score: 2**	19% **Score: 2**	33% **Score: 3**	20% **Score: 2**	69% **Score: 4**
Role as a Demand Supporter • *Comments are subjective*	Of interest to part of the touring market - to some, it is very important; to a larger percentage it is of some interest as part of "viewing wildlife" experience Not important to the meetings/convention market or the urban destination market Limited importance as a supporting activity for the vacation destination market				

PRODUCT: BIRD WATCHING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Growth Potential • *Data from US Forest Service Study; Increase in number of participants 1982-1994*	Increase in number of participants of 155%, the highest increase reported in the 30 - 40 activities included in this survey **Score: 5**; applied to all markets since data on the Canadian and European market is not available				
Multi-Season Potential - Shoulder • *Comments are subjective*	Spring and fall migratory periods are when the bird watching product in Nova Scotia is best; potential to generate trips is greater from the regional market				
Multi-Season Potential - Nov to April • *Comments are subjective*	Birdwatching is particularly strong in spring migratory period, March/April, along the South Shore and in the Bay of Fundy; also some potential in mid-winter with eagles in the Annapolis Valley				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	While natural resource is abundant and high quality with several unique species, such as Piping Plovers, Bald Eagles, Nova Scotia position as a destination for bird watching is moderate, with room for improvement.				
Latent Resource Quality/Potential • *Comments are subjective*	Nova Scotia's birding resources are of very high quality and it has been identified as the third/fourth best birding area in Canada. Geographic diversity means a wide variety of bird habitats and species. Location on the migratory fly way, range of shore/sea/song birds, and species such as piping plover, bald eagles, osprey are all contributing factors. Product is also relatively accessible although infrastructure development is needed.				
Constraints to Growth • *Comments are subjective*	There are very few, if any, constraints to growth that cannot be easily influenced with the development of infrastructure, interpretive material and guides, etc.				

REGIONAL SCORES

Birdwatching	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	3	2	3	3	2	1	1	
Latent Resource Quality	4	3	5	4	3	2	3	
Constraints to Growth	4	3	4	4	4	4	4	
Percent of Perfect Score	72%	52%	72%	72%	58%	45%	51%	

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:
Birdwatching

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL POINTS (Excl. Europe)
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	2	6	2	12	1	6	2	18	1	12	42
Visitor Satisfaction Levels	3	2	6	2	12	1	6	2	18		0	42
Potential Market Size	5	1	5	2	20	2	20	2	30	3	60	75
Role of the Product as a Travel Motivator	5	2	10	2	20	3	30	2	30	3	60	90
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	2	2.5	2	5	3	7.5	2	7.5	3	15	23
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	1	0.5	1	1	2	2	1	1.5	2	4	5
Growth Potential	4	5	20	5	40	5	40	5	60	5	80	160
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	3	15	2	20	2	20	2	30	2	40	85
November to April	5	3	15	2	20	2	20	2	30	2	40	85
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		33	**80.0**	33	**150.0**	33	**151.5**	33	**225.0**	30	**311.0**	**607**
Score as % of a Perfect Score			48%		45%		46%		45%		52%	46%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	3	45	3	45	3	67.5	3	90	180
Latent Resource Quality/Potential	6	4	24	4	48	4	48	4	72	4	96	192
Product Potential - Constraints/Capacity for Growth	6	4	24	4	48	4	48	4	72	4	96	192
Sub total: Product Related Criteria		19.5	**70.5**	19.5	**141.0**	19.5	**141.0**	19.5	**211.5**	19.5	**282.0**	**564**
Score as % of a Perfect Score			**72%**		**72%**		**72%**		**72%**		**72%**	**72%**
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**151**	**52.5**	**291**	**52.5**	**293**	**52.5**	**437**	**49.5**	**593**	**1171**
Score as % of a Perfect Score			57%		55%		56%		55%		60%	56%

NOTES:

REGIONAL COMMENTS

Cape Breton
Known for bald eagle population; also puffins and other sea birds on Bird Island

Resource quality moderate

South Shore
Strong USP due to location, range of migratory species and promotion of birdwatching opportunities in Shelburne County

Quality natural resources - on Atlantic Flyway for migratory birds; Cape Forchu area,

No major constraints to development

Annapolis Valley
Established birding area with a number of quality birding sites

Strong resources for this product, and various locations through the valley; e.g. Brier Island, winter eagle watching, Evangeline Beach, song birds in Kejimkujik National Park, (reportedly best bird watching in Nova Scotia for migratory sea birds)

No major constraints to development.

Eastern Shore
No recognition/product developed at present

Relatively poor resource compared to other parts of the province - some sea birds, off-shore islands with species

No major constraints to development

Northumberland Shore
No strong USP for birdwatching although the area has a variety of species and sites for waterfowl, shore birds, heron

Area has some good resources - Wallace River area, Munro Island, Rushton's Beach Park, Merigomish Island Beach, estuaries of some of major rivers, Antigonish Harbour Wildlife Management area

No major constraints to development

Fundy Shore
USP as waterfowl breeding area in marshes; also some coastal birds on tidal mudflats of Bay of Fundy

Some good quality birding areas within this region such as Chignecto National Wildlife Area - Amherst Point Migratory Bird Sanctuary & John Lushby Marsh -waterfowl breeding areas; sites are very accessible.

No major constraints to development

Halifax Urban Area N/A

BIRDWATCHING

MARKET READINESS ISSUES

- Are best birdwatching sites across the province identified, with information on what species can be seen, at what times of year, and directions on how to get there, available to visitors? - Need for an inventory of species that can be seen, by type and place (NS Birding Guides already available?)
- Nova Scotia reported to have third or fourth best birdwatching in Canada - best time is early spring for migratory birds, also fall migration as well as eagles in winter
- Need for key sites to be identified, basic infrastructure and access provided.

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- No major costs/challenges identified

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Develop a detailed list of bird species to be found in the province and more comprehensive interpretive information
- Identify key birding areas and compile detailed information on how to access, what to see, including brochures and information on species, locational map
- Develop a birding map of the province (e.g. Texas Map)
- Develop a birding site signage icon
- Identify a network of local birders who would be prepared to act as guides for out-of-province birders
- Birdwatching packages including an information kit on birdwatching, talks and presentations by local experts, guided field trips
- Establish a provincial Birdwatching Program similar to the Autumn Leaf Watch program, including a provincial interpretive brochure, web site, and identification and enhancement of key sites. Involve provincial birdwatching groups/associations in establishing this program, identifying sites and providing information for the web site.

PRODUCT: HUNTING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from number of out-of-province hunting licenses sold*	Total Non-resident licenses sold in Nova Scotia: Approximately 1,000 per year No break-down of geographic origin available Total number is below minimum threshold to score a 1; therefore for all markets **Score: 0**				
Visitor Satisfaction Levels	N/A	N/A	N/A	N/A	N/A
Potential Market Size • *Data is based on participation in hunting as main or secondary trip purpose, from Canadian Wildlife Survey and US Forest Survey; Applied to total population over 15 years;* • *European data is participation in hunting/fishing on all European trips to Canada; based on CTC Pleasure Travel Market Studies for UK & Germany*	4.1% participate in hunting on a trip Potential Market: 76.5 thousand persons **Score: 1**	1.5% participate in hunting on a trip Potential Market: 129 thousand persons **Score: 1**	3.0% participate in hunting on a trip Potential Market: 171.3 thousand persons **Score 1**	3.1% who participate and travel out-of-state Potential Market: 178.2 thousand persons **Score: 1**	10.6% participate in hunting or fishing Potential Market: 245.5 thousand **Score: 1**
Role as a Travel Motivator • *Data is based on participation in hunting as main or secondary trip purpose*	4% **Score: 1**	1.5% **Score: 1**	3% **Score: 1**	3% **Score: 1**	N/A
Role as a Demand Supporter • *Comments are subjective*	Very specialized market; Not a demand supporter for touring market, meetings and incentive travel market or urban destination market Limited role in supporting vacation destination market for that segment of the market with an interest in this activity				
Growth Potential • *Canadian data from Canadian Wildlife Survey; US Data from US Forest Service Study*	Nationally, decrease in participation from 7.3% in 1991 to 5.1% in 1996 **Score : 0**			Nationally, decrease in number of participants from 1982 to 1994 of 12%; **Score: 0**	Estimate based on North American data **Score: 0**
Multi-Season Potential - Shoulder • *Comments are subjective*	Main hunting season starts in late Fall; also some duck hunting earlier				

PRODUCT: HUNTING					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
Multi-Season [illegible]ential - Nov to April *• Comments are subjective*	Main hunting season (deer) in November/December; hence product has moderate appeal/potential to generate trips in this season				
PRODUCT CRITERIA					
Current Unique Selling Proposition *• Comments are subjective*	Nova Scotia hunting product limited primarily to deer, some birds, pheasants, and some limited bear. Not strongly positioned as a hunting destination compared to competing destinations such as New Brunswick, Newfoundland, Quebec, Maine				
Latent Resource Quality/Potential *• Comments are subjective*	Resource is limited primarily to deer and it is fairly widespread; there is a moose population but no non-resident moose hunting allowed. Have a good black bear population but only some 100 non-resident bear licenses issued a year.				
Constraints to Growth *• Comments are subjective*	Ability to grow limited by availability of resource, likely resident opposition to allowing non-resident moose hunting; conflicting land uses				

REGIONAL SCORES

Hunting	**Average Prov'l Score**	**Cape Breton**	**South Shore**	**Annapolis Valley**	**Fundy Shore**	**Eastern Shore**	**Northumb. Shore**	**Halifax Urban**
		Score	Score	Score	Score	Score	Score	Score
Current USP	0.13	3	2	0	1	2	1	
Latent Resource Quality	1.4	3	1	1	1	2	1	
Constraints to Growth	1	2	1	1	1	1	1	
Percent of Perfect Score	16%	54%	28%	12%	20%	34%	20%	

NOVA SCOTIA PRODUCT MARKET MATCH STUDY
PRODUCT:
Hunting

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	POINTS
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		(Excl.
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		Europe)
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	0	0	0	0	0	0	0	0	0	0	0
Visitor Satisfaction Levels NO DATA	3		0		0		0		0		0	0
Potential Market Size (3)	5	1	5	1	10	1	10	1	15	1	20	40
Role of the Product as a Travel Motivator	5	1	5	1	10	1	10	1	15	1	20	40
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	0	0	0	0	0	0	0	0	0	0	0
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential	4	0	0	0	0	0	0	0	0	0	0	0
Multi-Season Potential												
Shoulder Season (May/June, Sept/Oct)	5	1	5	1	10	1	10	1	15	1	20	40
November to April	5	2	10	2	20	2	20	2	30	2	40	80
Market Awareness- NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		30	25.5	30	51.0	30	51.0	30	76.5	30	102.0	204
Score as % of a Perfect Score			17%		17%		17%		17%		17%	17%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	1	7.5	0	0	0	0	0	0	0	0	8
Latent Resource Quality/Potential	6	1	6	1	12	1	12	2	36	1	24	66
Product Potential - Constraints/Capacity for Growth	6	1	6	1	12	1	12	1	18	1	24	48
Sub total: Product Related Criteria		19.5	19.5	19.5	24.0	19.5	24.0	19.5	54.0	19.5	48.0	122
Score as % of a Perfect Score			20%		12%		12%		18%		12%	16%
TOTAL: MARKET AND PRODUCT CRITERIA		49.5	45	49.5	75	49.5	75	49.5	131	49.5	150	326
Score as % of a Perfect Score			18%		15%		15%		18%		15%	16%

NOTES:

3 Canadian data refers to 'Importance of Wildlife to Canadians' report (1996) on the % of population over 15 yrs that participated in hunting as a main or secondary trip activity. US data ref

REGIONAL COMMENTS

Cape Breton
Moose population is in Cape Breton Highlands; good deer population

Major constraint is licensing regulations for non-residents and limited trophy size deer (same for each region)

South Shore
Deer generally available throughout the area

Annapolis Valley
Best area for pheasant but limited resource potential; some deer

Eastern Shore
Deer generally available throughout the area; less populated area suggests greater population- also several wilderness areas

Northumberland Shore
Deer generally available throughout the area

Fundy Shore
Deer generally available throughout the area; less populated area suggests a greater population; likewise for bear

Halifax Urban Area N/A

HUNTING

MARKET READINESS ISSUES
- Limitations on non-resident hunting (e.g. no moose) severely limit potential to attract markets from outside the province

COSTS/CHALLENGES TO FURTHER DEVELOPMENT
- Regulations re non-resident hunting
- Conflict with high demand by resident markets for hunting licenses

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES
- Allow limited license quota for non-resident moose hunting

PRODUCT: FISHING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels* • *Ont/Que data is for "other Canadians"*	3% participation rate; 19,900 persons **Score: 2**	8% participation rate; 27,000 persons **Score: 2**	8% participation rate; 6,200 persons **Score: 1**	5% participation rate 8,600 persons **Score: 1**	3% participation rate 1,000 persons **Score: 0**
Visitor Satisfaction Levels • *Data from NS Marine Tourism Study: % saying "salt water fishing" is much better than elsewhere (Small sample)* • *No data on other types of fishing*	38% **Score : 3**			US: 36% **Score: 3**	N/A
Potential Market Size • *Data is from NS Marine Tourism Study: % where salt water fishing is critically important in selecting a vacation destination: insufficient sample to adjust data by origin* • *Applied to total person trips from the market, to or within Canada (inter-prov'l)* • *European data is participation in hunting/fishing on all European trips to Canada; based on CTC Pleasure Travel Market Studies for UK & Germany*	19% Potential Market: 310 thousand person trips **Score: 1**	19% Potential Market: 666.5 thousand person trips **Score: 2**	19% Potential Market: 364.2 thousand person trips **Score: 2**	19% Potential Market: 773.1 thousand person trips **Score: 2**	10.6% participation rate in Canada (Hunting/Fishing) Potential Market: 245.5 thousand person trips **Score: 1**
Role as a Travel Motivator • *Data is from NS Marine Tourism Study*	19% **Score: 2**	19% **Score: 2**	19% **Score: 2**	19% **Score: 2**	N/A
Role as a Demand Supporter • *Comments are subjective*	Of limited interest to a small percentage of the touring market No role in meetings market or urban destination market Limited interest to vacation destination market				

PRODUCT: FISHING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Growth Potential • *Canadian data from Canadian Wildlife Survey, US Data from US Forest Service Study - change from 1982 to 1994*	Decrease in participation rate nationally from 26% in 1991 to 17.7% in 1996 although average number of days participating in fishing increased from 14.3 to 17.2. **Score: 0**			Decrease in # of participants in US of 3.8%, **Score: 0**	Estimate based on North American data **Score: 0**
Multi-Season Potential - Shoulder • *Comments are subjective*	Spring/fall season is good for river/lake fishing; appeal is reasonably good in the regional marketplace but much more limited in Ontario/Quebec markets where there are lots of other opportunities;				
Multi-Season Potential - Nov to April • *Comments are subjective*	Some very limited potential in early spring in regional marketplace, otherwise no potential in this season				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Province has a range of fresh and saltwater species available; Fresh water species include trout, Atlantic Salmon, Bass. Saltwater species including tuna, mackerel, pollock, shark. Recent problems with resource quality and reliability as well as changes in regulations have hurt province's USP in this market.				
Latent Resource Quality/Potential • *Comments are subjective*	Moderate quality overall; some good species but resource tends to be inconsistent from season to season and thi makes it difficult to depend on resource as a basis for product.				
Constraints to Growth • *Comments are subjective*	Major constraint is availability of consistent resource of species that are of interest to out-of-province fishers - both quality and quantity				

REGIONAL SCORES

Fishing	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	2	2	3	2	0	2	0	2
Latent Resource Quality	2	2	3	2	2	2	2	3
Constraints to Growth	1	2	2	1	1	1	1	2
Percent of Perfect Score	34%	40%	54%	34%	18%	18%	18%	46%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:
Fishing

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	**POINTS (Excl. Europe)**
Current Visitation to NS May to Oct 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	2	6	2	12	1	6	1	9	0	0	33
Visitor Satisfaction Levels (Saltwater only)	3	3	9	3	18	3	18	3	27		0	72
Potential Market Size	5	1	5	2	20	2	20	2	30	1	20	75
Role of the Product as a Travel Motivator	5	2	10	2	20	2	20	2	30		0	80
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	1	1.25	1	2.5	1	2.5	1	3.75	1	5	10
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential	4	0	0	0	0	0	0	0	0	0	0	0
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	3	15	1	10	1	10	1	15	1	20	50
November to April	5	1	5	0	0	0	0	0	0	0	0	5
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*33*	**51.8**	*33*	**83.5**	*33*	**77.5**	*33*	**116.3**	*25*	**47.0**	**329**
Score as % of a Perfect Score			31%		25%		23%		23%		9%	25%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	2	15	2	30	2	30	2	45	1	30	120
Latent Resource Quality/Potential	6	2	12	2	24	2	24	2	36	2	48	96
Product Potential - Constraints/Capacity for Growth	6	1	6	1	12	1	12	1	18	1	24	48
Sub total: Product Related Criteria		*19.5*	**33.0**	*19.5*	**66.0**	*19.5*	**66.0**	*19.5*	**99.0**	*19.5*	**102.0**	**264**
Score as % of a Perfect Score			34%		34%		34%		34%		26%	34%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**85**	**52.5**	**150**	**52.5**	**144**	**52.5**	**215**	**44.5**	**149**	**593**
Score as % of a Perfect Score			32%		28%		27%		27%		17%	28%

NOTES:

14/01/00

REGIONAL COMMENTS

Cape Breton
USP is representative of province overall with a range of lakes stocked with Speckled Trout and some Rainbow Trout. The Margaree River and the Grand River represent some of the most bountiful Atlantic Salmon stocks in the province. The northwest arm of Cape Breton, as well as St. Georges Bay between Cape Breton and the Northumberland Shore is also one of the key Tuna fishing areas in the province. Mackerel is also common along the northwest coastline.

Latent resource potential is moderate; quality and reliability of resource and inconsistent regulations a constraint to growth.

South Shore
USP - The South Shore also has several key Salmon fishing areas, including the Moser River, the Gold River, the La Have River and the Medway River. In addition, there are a wide range of lakes with Speckled and Rainbow Trout stocks. The coastline from Halifax to the Chester Basin provides some good Mackerel fishing opportunities. Some Pollock stocks can also be found just west of the Chester Basin. Wedgeport and the Tusket Islands area is also known for its Tuna fishing opportunities.

Latent resource potential is moderate; if tuna stocks are strong, then good potential for this lucrative product; quality and reliability of resource and inconsistent regulations a constraint to growth.

Annapolis Valley
USP - The Annapolis River is known for its Striped Bass fishing. The Canadian record Striped Bass was caught in the province in 1994, weighing 54.06 lbs. There are also many lakes with Smallmouth Bass, Speckled Trout and some Rainbow Trout stocks. Some Pollock and Mackerel can also be found in St. Mary's Bay.

Latent Resource Potential is moderate; quality and reliability of resource and inconsistent regulations a constraint to growth. Also, striped bass stocks are declining.

Eastern Shore
USP - The Stewiacke River and St. Mary's River are some of the most bountiful Atlantic Salmon rivers in the province. There are also many secluded lakes with excellent Speckled Trout stocks. The coastline is good for Pollock fishing and the Chedabucto Bay area (near Canso) is popular for Tuna and Mackerel fishing.

Latent resource potential moderate; quality and reliability of resource and inconsistent regulations a constraint to growth.

Northumberland Shore
Some Mackerel fishing is available along the coastline. There are also some locations where Striped Bass and White Perch may be found. Generally, relative to the geographic size of the region, the USP for fishing in this region is less than for the other regions.

Latent resource potential moderate; quality and reliability of resource and inconsistent regulations a constraint to growth.

Fundy Shore
Similar to the Northumberland Shore, the USP for fishing in the Fundy Shore region appears considerably less than for other regions in the province.

Latent resource potential moderate; quality and reliability of resource and inconsistent regulations a constraint to growth.

Halifax Urban Area
USP - The primary USP for Halifax is its Shark fishing. Shark fishing derbies are becoming increasingly popular. Mackerel is also commonly fished off the coast of the Halifax/Dartmouth region. There are also many small lakes where Speckled Trout stocks are maintained.

Latent Resource Potential - Derbies and competitions are becoming more popular, further opportunities to develop and package these events exist.

Quality and reliability of resource and inconsistent regulations a constraint to growth.

FISHING

MARKET READINESS ISSUES

- Resource availability and quality an issue - supply of many species, e.g. salmon, is inconsistent and regulations re fishing seasons and limits often change;
- Nature of species available limits potential; some quality saltwater fishing resources (mackerel, bluefish, tuna, etc.) but resource is inconsistent
- Availability/quantity of saltwater sports fishing charter operators is very inconsistent - operators are only in business on very much a part-time basis

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Continued availability of a quality resource is a concern
- Regulatory issues - changes to seasons and/or moratoriums on short notice;
- DFO does not make a distinction between commercial and recreational fishing - recreational fishing is frequently closed or cut back

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Tournaments/derbies - tuna, sea bass

PRODUCT: BEACHES - SUN AND SAND

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels, for "Going to a Beach"* • *Ont/Que data is for "other Canadians"*	14% participation rate; 93,100 persons **Score: 3**	35% participation rate; 118,100 persons **Score: 4**	35% participation rate; 26,900 persons **Score: 2**	38% participation rate 65,500 persons **Score: 3**	39% participation rate 13,600 persons **Score: 1**
Visitor Satisfaction Levels	N/A	N/A	N/A	N/A	N/A
Potential Market Size • *Data is from various NB research on role of beaches in motivating trips* • *European data is from CTC Pleasure Travel to North America series* • *Applied to total person trips from the market, to or within Canada (inter-provincial)*	50% Potential Market: 816.5 thousand person trips **Score: 2**	36% Potential Market: 1.26 million person trips **Score: 3**	51% Potential Market: 977.7 thousand person trips **Score: 2**	20% Potential Market: 813.8 thousand person trips **Score: 2**	71% Potential Market (France, Germany & UK): 1.64 million person trips **Score: 3**
Role as a Travel Motivator • *Data is from various NB research on role of beaches in motivating trips*	50% **Score: 4**	36% **Score: 3**	51% **Score: 4**	42% **Score: 3**	71% **Score: 4**
Role as a Demand Supporter • *Comments are subjective*	Of interest to part of the touring market, and to the Quebec market and the European market to a greater extent Of no importance as a demand supporter for the meetings/convention market or the urban destination market Important as a supporting activity for a significant portion of the vacation destination market				
Growth Potential • *No data available*	N/A	N/A	N/A	N/A	N/A
Multi-Season Potential - Shoulder • *Comments are subjective*	Some very limited appeal to selected markets in the later spring/early fall but primarily a peak season product				
Multi-Season Potential - Nov to April • *Comments are subjective*	No potential				

PRODUCT: BEACHES - SUN AND SAND					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	USP not strong in NS for this product compared to PEI and NB; water is colder and image is of scenic coastline not sandy, sunny beaches				
Latent Resource Quality/Potential • *Comments are subjective*	Natural resource of moderate quality; while there are a number of high quality, sand beaches the cold water and weather limits appeal for traditional sun/sand experiences. Beaches are more suited for walking, beachcombing etc. and there are many excellent resources for this (see Beaches: Coastline/Seacoast product)				
Constraints to Growth • *Comments are subjective*	Public access to the coastline and public ownership of quality beach properties are major constraints to growth.				

REGIONAL SCORES

Beaches - Sun, Sand, Sun	**Average Prov'l Score**	**Cape Breton**	**South Shore**	**Annapolis Valley**	**Fundy Shore**	**Eastern Shore**	**Northumb. Shore**	**Halifax Urban**
		Score	Score	Score	Score	Score	Score	Score
Current USP	1.6	1	3	0	1	3	3	
Latent Resource Quality	2	2	3	0	1	2	3	
Constraints to Growth	2	2	2	1	1	3	2	
Percent of Perfect Score	37%	32%	54%	6%	20%	54%	54%	

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:

Beaches: Sun/Sand/Swim

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	**POINTS (Excl. Europe)**
Current Visitation to NS. May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS. Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	3	9	4	24	2	12	3	27	1	12	72
Visitor Satisfaction Levels NO DATA	3		0		0		0		0		0	0
Potential Market Size	5	2	10	3	30	2	20	4	60	3	60	120
Role of the Product as a Travel Motivator	5	4	20	3	30	4	40	3	45	4	80	135
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	2	2.5	2	5	3	7.5	2	7.5	3	15	23
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	3	1.5	3	3	4	4	3	4.5	4	8	13
Growth Potential - NO DATA	4		0		0		0		0		0	0
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	1	5	1	10	0	0	0	0	0	0	15
November to April	5	0	0	0	0	0	0	0	0	0	0	0
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*26*	**48.0**	*26*	**102.0**	*26*	**83.5**	*26*	**144.0**	*26*	**175.0**	**378**
Score as % of a Perfect Score			37%		39%		32%		37%		34%	36%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	2	15	2	30	2	30	1	22.5	1	30	98
Latent Resource Quality/Potential	6	2	12	2	24	2	24	2	36	2	48	96
Product Potential - Constraints/Capacity for Growth	6	2	12	2	24	2	24	2	36	2	48	96
Sub total: Product Related Criteria		*19.5*	**39.0**	*19.5*	**78.0**	*19.5*	**78.0**	*19.5*	**94.5**	*19.5*	**126.0**	**290**
Score as % of a Perfect Score			40%		40%		40%		32%		32%	37%
TOTAL: MARKET AND PRODUCT CRITERIA		**45.5**	**87**	**45.5**	**180**	**45.5**	**162**	**45.5**	**239**	**45.5**	**301**	**667**
Score as % of a Perfect Score			38%		40%		35%		35%		33%	37%

NOTES:

REGIONAL COMMENTS

Cape Breton
USP for this product is fairly weak

Resources are limited compared to other regions - there are a few sand beaches (e.g. Ingonish, Point Michaud and on the west coast in Port Hood and Inverness) but water is very cold

Major constraint to further development is availability of suitable natural resources

South Shore
One of three stronger regions in the province for beaches; numerous sand beaches from edge of urban area down through Somerville area and beyond; many in public ownership with basic infrastructure.

Good quality natural resources although water is cold.

Major constraint to further development is public land ownership/access to other appropriate sites and importance of protecting sensitive beach areas.

Annapolis Valley
Virtually no product of this type - Bay of Fundy shore does not lend itself to sandy beaches.

Constraint to development is lack of suitable resources.

Eastern Shore
One of three stronger regions in province - several major beach parks with excellent quality beaches and basic infrastructure; however, water is cold and weather often not conducive to sun/sand/swim product. Sandcastle building competition a USP for Clam Harbour.

Good quality natural resources but cold water.

Northumberland Shore
Third region of province with good beaches, and has generally warmer water with a number of established beach parks - e.g. Northport Beach, Rushton's, Melmerby, Heather.

Good quality natural resources

Major constraint is public land ownership/access to ocean and conflicts with cottaging activities

Fundy Shore
Some limited product but not nearly as extensive or as good quality as other regions due to impact of tides.

Major constraint to further development is availability of suitable natural resources

Halifax Urban Area N/A

BEACHES - SUN, SAND, SWIM

MARKET READINESS ISSUES

- Issue of lifeguarding services and length of season they are provided
- There are a number of excellent quality beaches along the South Shore, Eastern Shore, Northumberland Shore, Cape Breton, Yarmouth/Clare area but in most locations the water is cold for swimming
- Province reportedly has over 400 beaches, many of them of good quality
- A significant portion of the beaches are identified as such to the public, are not accessible and/or have no basic infrastructure

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Protecting public access to beaches - maintain/increase public ownership of coastal lands, issue of public access over private land and ownership of lands adjacent to beaches, protection/enforcement of right-of-ways.
- Some beaches are sensitive natural areas and should not be promoted; these ones need to be identified as such and ensure that local/regional tourism groups respect the sensitivity of these areas.
- Need to address issue of safety/liability - if areas are promoted, government must assume some degree of liability - how can this be addressed. Also, need to address basic maintenance - who, how, funding?

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- More signage and basic infrastructure (parking areas, access routes, garbage cans), particularly for beaches that are not provincial parks
- Provincial beach brochure/guide, highlighting the "best" beaches for walking, scenery, swimming, birdwatching, beachcombing, etc. including interpretive information
- See additional comments under Beaches: Marine/Coastal Experiences

PRODUCT: BEACHES- A COASTAL EXPERIENCE

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from NS Marine Study adjusted to allow for differences in participation rates between Exit Survey sample and sample of enquirers*	22% participation rate; 146,200 persons **Score: 4**	53% participation rate; 178,900 persons **Score: 4**	47% participation rate; 36,200 persons **Score: 2**	69% participation rate 118,800 persons **Score: 4**	N/A
Visitor Satisfaction Levels • *Data from NS Marine Study indicating "walking along the beach or seashore" is much better than elsewhere*	Canadian Market: 23% **Score: 2**			US Market: 26% **Score: 2**	N/A
Potential Market Size • *Data is from 1998 Conversion Study; unaided: % saying "beaches/coastline" was important to vacation destination decision* • *European data is from CTC Pleasure Travel Market Studies; "remote coastal attractions"* • *Applied to total person trips from the market, to or within Canada (inter-prov'l)*	22% Potential Market: 359.3 thousand person trips **Score: 2**	15% Potential Market: 526.2 thousand person trips **Score: 2**	9% Potential Market: 172.5 thousand person trips **Score: 1**	17.5% Potential Market: 712.1 thousand person trips **Score: 2**	50% Potential Market (France, Germany & UK): 1.16 million person trips **Score: 3**
Role as a Travel Motivator • *Data is from same sources as above*	22% **Score: 2**	15% **Score: 2**	9% **Score: 1**	17.5% **Score: 2**	50% **Score: 4**
Role as a Demand Supporter • *Comments are subjective*	Seen to play a role as a demand supporter for all market segments, particularly the touring market and the vacation destination market; a contributing factor in vacation destination decisions and a key element of Nova Scotia's experience				
Growth Potential • *Based on data from US Forest Service Study on "recreational walking"; Increase in number of participants 1982-1994*	Increase in number of participants of 43%; Score applied to all markets since no additional data available **Score: 4**				Estimated at same score as North America

PRODUCT: BEACHES- A COASTAL EXPERIENCE					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
Multi-Season Potential - Shoulder *• Comments are subjective*	Product has reasonably good appeal in the shoulder seasons, particularly late spring and early fall; appeal is expected to be stronger for regional, Ontario and European markets that are not as interested in the "sun/sand" beach product and more into recreational walking.				
Multi-Season Potential - Nov to April *• Comments are subjective*	Some limited appeal during this season as well, although not as consistent depending on weather conditions. Again, appeal is stronger for regional, Ontario and European markets				
PRODUCT CRITERIA					
Current Unique Selling Proposition *• Comments are subjective*	Nova Scotia has a strong USP as "Canada's Seacoast Destination"; some competition from other Atlantic provinces			USP not as strong in the US and European markets	
Latent Resource Quality/Potential *• Comments are subjective*	Nova Scotia's coastal/beach product is of very high quality, in almost all areas of the province. Offers a mix of different types of beaches, generally fairly accessible (e.g. to coastal driving routes), and with good public access.				
Constraints to Growth *• Comments are subjective*	Some significant constraints to growth - increasing private land ownership/development along the coastline, limited resources for public land acquisition/development				

REGIONAL SCORES

Beaches - Coastal/Walking Sea Coast Experiences	**Average Prov'l Score**	**Cape Breton**	**South Shore**	**Annapolis Valley**	**Fundy Shore**	**Eastern Shore**	**Northumb. Shore**	**Halifax Urban**
		Score	Score	Score	Score	Score	Score	Score
Current USP	3.6	4	3	2	2	3	1	
Latent Resource Quality	5	4	4	3	3	3	2	
Constraints to Growth	3	3	3	2	3	4	3	
Percent of Perfect Score	77%	74%	66%	46%	52%	66%	38%	

NOVA SCOTIA PRODUCT MARKET MATCH STUDY
PRODUCT:
Beaches: Coastline/Walking/Seacoast

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	POINTS (Excl. Europe)
Current Visitation to NS May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	4	12	4	24	2	12	4	36		0	84
Visitor Satisfaction Levels	3	2	6	2	12	2	12	2	18		0	48
Potential Market Size	5	2	10	2	20	1	10	2	30	3	60	70
Role of the Product as a Travel Motivator	5	2	10	2	20	1	10	2	30	4	80	70
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	3	3.75	5	12.5	4	10	4	15	5	25	41
- Meetings and Incentive Travel Market	0.75	2	1.5	2	3	2	3	2	4.5	2	6	12
- Urban Destination Market	0.5	2	1	2	2	2	2	2	3	2	4	8
- Vacation Destination Market	0.5	4	2	5	5	4	4	4	6	4	8	17
Growth Potential (based on recreational walking data)	4	4	16	4	32	4	32	4	48	4	64	128
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	3	15	3	30	2	20	2	30	3	60	95
November to April	5	2	10	1	10	0	0	0	0	1	20	20
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		33	**87.3**	33	**170.5**	33	**115.0**	33	**220.5**	27	**327.0**	**593**
Score as % of a Perfect Score			53%		52%		35%		45%		61%	45%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	4	30	4	60	4	60	3	67.5	3	90	218
Latent Resource Quality/Potential	6	5	30	5	60	5	60	5	90	5	120	240
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		19.5	**78.0**	19.5	**156.0**	19.5	**156.0**	19.5	**211.5**	19.5	**282.0**	**602**
Score as % of a Perfect Score			80%		80%		80%		72%		72%	77%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**165**	**52.5**	**327**	**52.5**	**271**	**52.5**	**432**	**46.5**	**609**	**1195**
Score as % of a Perfect Score			63%		62%		52%		55%		65%	57%

NOTES:

14/01/00

REGIONAL COMMENTS

Cape Breton
Cape Breton coastline one of province's strongest USPs; variety of opportunities for walking on beaches and coastal areas, and viewing coastal vistas

High quality natural resources for this activity with further untapped potential in more remote areas

Major constraint to development is availability of public land/public access to coastal areas (same for all regions)

South Shore
Region offers range of different coastal experiences from beaches to rocky shorelines though USP not as strong as Cape Breton

High quality resources for this activity with further untapped potential for public access to coastal areas

Lack of public land and pressures of development are major constraints to further development.

Annapolis Valley
Not well-established as a coastal area - focus has traditionally been on the interior; potential for strengthening positioning re Bay of Fundy.

Some good quality natural resources for this product but need for improved access.

Eastern Shore
Similar to South Shore - offers a range of different coastal experiences, beaches, rocky shores, trails, scenic vistas and look offs.

Quality natural resources; ocean is fairly readily accessible since development pressures are less.

Constraints to further development are minimal.

Northumberland Shore
Other than sun/sand beaches, not a strong USP - ocean is harder to access and vistas not as good quality; private cottage development along ocean a constraint.

Natural resource of moderate quality for this product.

Fundy Shore
Not well established as a coastal area but has good quality natural resources, accessible coastline, scenic vistas, fossils, tidal flats, coastal walks. Development of coastal trails and sites is beginning to take place - quality of resource suggests potential for further development;

Constraints are more moderate than other, more densely populated/high growth areas.

Halifax Urban Area N/A

BEACHES - MARINE/COASTAL EXPERIENCES

MARKET READINESS ISSUES

- Large number and variety of beaches and coastal areas offering marine experiences - issues relate to availability of infrastructure, access. See discussion under Beaches- Sun/Sand
- Need signage and basic infrastructure
- Need a guide to identify locations and facilities/services available
- Right of ways to beaches/coastal areas need to be protected - need improved policy and efforts in this area to ensure that there is access to public coastal areas

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Need to ensure continued access to marine/coastal areas - major role for government in identifying areas which should be protected, acquiring coastal lands to ensure continued public access, protecting public right of ways. Possible actions to protect coastal access might include:

  - Establish a new class of provincial park - Marine Provincial Parks or add significant marine components to land based parks
  - Make sure provincial crown land on coast, and crown-owned islands are protected; acquire more coastal land and islands as crown property
  - Establish Marine Protected Areas (federal program) - Eastern Shore Archipelago? Fundy area?

- Need to address issue of safety/liability - if areas are promoted, government must assume some degree of liability - how can this be addressed. Also, need to address basic maintenance - who, how, funding?

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Need for signage to identify access to public coastal areas - all year round; also some basic infrastructure to protect against negative impacts on resource and provide basic services - parking, washrooms, drinking water, garbage cans, etc.
- Establish areas with quality natural resource to become significant centres for marine tourism activity - Port Mouton/Keji/Port Joli; Wedgeport/Argyle/Pubnico; Economy/Five Islands/Parrsboro; St. George's Bay/Pomquet; Digby/Digby Neck/Brier Island; Isle Madame - with a range of marine based activities, businesses, coastal accommodations, etc. Fits with marine heritage product as well.
- Opportunities for coastal "products" that provide interpretation of other natural phenomena such as tides
- Develop a guide/fulfilment piece that provides basic information, including the types of experiences available, provides map, etc.

PRODUCT: NATIONAL/PROVINCIAL PARKS

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels* • *Ont/Que data is for "other Canadians*	11% participation rate; 73,100 persons **Score: 3**	34% participation rate; 114,800 persons **Score: 4**	34% participation rate; 26,200 persons **Score: 2**	41% participation rate 70,600 persons **Score: 3**	48% participation rate 16,700 persons **Score: 1**
Visitor Satisfaction Levels • *Data Parks Canada surveys on National Parks; score discounted by 1 point to take into account provincial parks*	77% **Score : 4**	79% **Score: 4**	73% **Score: 4**	89% **Score: 4**	N/A
Potential Market Size • *Data is from Parks Canada conversion studies; European data from CTC Pleasure Travel Market Studies* • *Applied to total person trips from the market, to or within Canada (inter-provincial)*	40.4% Potential Market: 659.7 thousand person trips **Score: 2**	30.8% Potential Market: 1.1 million person trips **Score: 3**	37.5% Potential Market: 718.9 thousand person trips **Score: 2**	20% Potential Market: 813.8 thousand person trips **Score: 2**	65.5% Potential Market (France, Germany & UK): 1.5 million person trips Score: 3
Role as a Travel Motivator • *Data is from Parks Canada conversion studies saying that parks were types of experiences they were seeking when planning their vacation in current year*	40.4% **Score: 3**	30.8% **Score: 3**	37.5% **Score: 3**	20% **Score: 2**	N/A
Role as a Demand Supporter • *Comments are subjective*	Visiting parks an important activity for much of the touring market, particularly from Quebec and Europe Not important as demand supporters for the meetings/convention market or the urban destination market Limited importance as a supporting activity for the vacation destination market				
Growth Potential	Data on participation from Canadian Travel Survey suggests a decline in participation levels; other data suggest an increase. Score estimated at 1 for all markets.				
Multi-Season Potential - Shoulder • *Comments are subjective*	National/provincial parks have moderate to good appeal in both the spring and the fall; Cape Breton Highlands National Park particularly strong fall product; appeal is particularly strong for European market				

PRODUCT: NATIONAL/PROVINCIAL PARKS

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Multi-Season Potential - Nov to April • *Comments are subjective*	Some limited appeal for regional and European markets in this period				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Cape Breton Highlands National Park has a particularly strong USP; Keji and provincial parks to a lesser degree; relatively strong competition from elsewhere in Atlantic Canada (e.g. Gros Morne, Fundy, Kouchibouguac, PEI National Park)				
Latent Resource Quality/Potential • *Comments are subjective*	Quality of natural resources for park development are very high; variety of landscapes, seacoast and inland areas; unique features such as coastal barrens; protected areas				
Constraints to Growth • *Comments are subjective*	Conflicting land uses and opposition from local residents are constraints that are/will be a challenge to overcome; availability of resources also an issue				

REGIONAL SCORES

National/Provincial Parks	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	3	5	2	4	2	3	1	
Latent Resource Quality	4	3	4	3	4	3	2	
Constraints to Growth	2	2	2	2	3	2	2	
Percent of Perfect Score	60%	69%	52%	61%	58%	54%	32%	

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:
National/Provincial Parks

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	POINTS (Excl. Europe)
Current Visitation to NS May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,465		186,116		43,336		
CRITERIA	**Weight**	**Score**	**Points**	**Score**	**Points**	**Score**	**Points**	**Score**	**Points**	**Score**	**Points**	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	3	9	4	24	2	12	3	27	1	12	72
Visitor Satisfaction Levels	3	4	12	4	24	4	24	4	36		0	96
Potential Market Size	5	2	10	3	30	2	20	2	30	3	60	90
Role of the Product as a Travel Motivator	5	3	15	3	30	3	30	2	30		0	105
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	3	3.75	3	7.5	4	10	3	11.25	4	20	33
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	1	0.5	1	1	2	2	1	1.5	2	4	5
Growth Potential	4	1	4	1	8	1	8	1	12	1	16	32
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	3	15	3	30	2	20	3	45	4	80	110
November to April	5	2	10	0	0	0	0	0	0	2	40	10
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		33	**79.3**	33	**154.5**	33	**126.0**	33	**192.8**	25	**232.0**	**553**
Score as % of a Perfect Score			48%		47%		38%		39%		46%	42%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	3	45	3	45	3	67.5	3	90	180
Latent Resource Quality/Potential	6	4	24	4	48	4	48	4	72	4	96	192
Product Potential - Constraints/Capacity for Growth	6	2	12	2	24	2	24	2	36	2	48	96
Sub total: Product Related Criteria		19.5	**58.5**	19.5	**117.0**	19.5	**117.0**	19.5	**175.5**	19.5	**234.0**	**468**
Score as % of a Perfect Score			60%		60%		60%		60%		60%	60%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**138**	**52.5**	**272**	**52.5**	**243**	**52.5**	**368**	**44.5**	**466**	**1021**
Score as % of a Perfect Score			52%		52%		46%		47%		52%	49%

NOTES:

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REGIONAL COMMENTS

Cape Breton
Strong USP due to Cape Breton Highlands National Park - international recognition; provincial park development limited

Natural Resource potential for additional park development of moderate potential

Major constraints due to public concern over restrictions on land use and activities

South Shore
Not well known for park development other than for beach parks; new Thomas Raddell Park and Kejimkujik Seaside Adjunct recent developments which provide opportunity to increase USP

Quality natural resources available for additional park development, particularly in coastal areas, including several protected areas.

Major constraints include availability of land due to increasing private ownership of coastal lands, increasing costs of land acquisition.

Annapolis Valley
Strong USP due to presence of Kejimkujik National Park; also several provincial parks such as Blomidon,

Latent resource quality/potential is moderate

Major constraint is availability of land.

Eastern Shore
No national park but a number of provincial beach parks give this area its USP for this product

Some unique, quality natural resources available for further park development - Tangier Grand Wilderness area, Canso Barrens, Eastern Shore Archipelago

Major constraint is public concern over restrictions on land use and activities.

Northumberland Shore
Very limited product at present other than some provincial beach parks.

Resource potential is moderate.

Fundy Shore
Moderate USP for park product based- only a few provincial parks, but Five Islands very scenic and offers unique experiences; also development of Cape Chignecto likely to strengthen the USP

Good quality natural resources in this area for park development - wilderness areas, coastal areas and limited pressure from private development.

Halifax Urban Area N/A

NATIONAL/PROVINCIAL PARKS

MARKET READINESS ISSUES

- Many of the parks are officially "closed" in the shoulder and November to April periods - even though much of the experience they provide is still available and accessible

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Limited financial and human resources within National and Provincial Parks departments - limits ability to extend the operating season at these facilities
- Only a low percentage of Nova Scotia's land base is protected natural areas

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Better interpretive signage in provincial parks and wilderness areas
- Acquisition and preservation of more land as parks/protected areas, particularly coastal lands
- Ensure that existing provincial Crown Land is protected and managed
- Work with community groups and regional Department of Natural Resource staff to develop new models for maintaining parks in the shoulder and November to April period so that these facilities can remain open
- Establish Marine Parks(s)/Marine Protected Areas in Nova Scotia

PRODUCT: CAMPING - RECREATIONAL VEHICLE

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1998 Tourism Statistics - visitors arriving by RV*	19,800 persons **Score: 2**	25,900 persons **Score: 2**	6,000 persons **Score: 1**	13,600 persons **Score: 1**	No data; estimated **Score: 1**
Visitor Satisfaction Levels	N/A	N/A	N/A	N/A	N/A
Potential Market Size	N/A	N/A	N/A	N/A	N/A
Role as a Travel Motivator	For that segment of the market that travels by RV, the experience is a high motivator of travel activity **Estimated Score for all markets: 3**				
Role as a Demand Supporter • *Comments are subjective*	Very important as a demand supporter to that portion of the touring market - to some, it is very important; to a larger percentage it is of some interest as part of "viewing wildlife" experience Of no interest as a demand supporter for the meetings/convention market or the urban destination market Limited importance as a supporting activity for the vacation destination market				
Growth Potential • *General data on growth in number of Recreational vehicles being purchased in the US; also significant increases in RV visitation to Nova Scotia in past few years;*	Number of recreational vehicles purchased in the US has increased by 6% in 1997 over 1996; RV rentals increased 20% in 1996 over 1995 (Source: US Travel Outlook Report); word of mouth suggests significant growth in European market travelling in Canada via recreational vehicle Score estimated at 2 for Canadian market, 4 for US market and 3 for European market				
Multi-Season Potential - Shoulder • *Comments are subjective*	Spring and fall have moderate appeal for this product, moreso for the European market which is not as weather sensitive as North American markets				
Multi-Season Potential - Nov to April • *Comments are subjective*	Some limited potential in this period, particularly November and mid-March/April, and moreso with the European market				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Essentially a touring product so USPs reflect those of the touring product - e.g. Cabot Trail, coastal touring routes; USP stronger in Europe because of high interest in RV touring in combination with appeal of NS; quality of campground facilities for recreational vehicles weakens USP				

PRODUCT: CAMPING - RECREATIONAL VEHICLE					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
Latent Resource Quality/Potential • *Comments are subjective*	Reasonably good quality - excellent for scenery and overall appeal of destination but character of many of the touring routes (two lane, narrow, lack of pull offs, steep hills, surface conditions) is not ideal for recreational vehicles, particularly the larger ones.				
Constraints to Growth • *Comments are subjective*	Constraints to future growth include capacity (and quality) of road network and smaller communities to accommodate the large recreational vehicles				

REGIONAL SCORES

Camping - Recreational Vehicle	**Average Prov'l Score**	**ape Breton**	**South Shore**	**Annapolis Valley**	**Fundy Shore**	**Eastern Shore**	**Northumb. Shore**	**Halifax Urban**
		Score	Score	Score	Score	Score	Score	Score
Current USP	3.3	4	2	3	2	1	1	3
Latent Resource Quality	3	3	3	2	3	3	2	1
Constraints to Growth	4	3	3	3	2	2	2	1
Percent of Perfect Score	66%	68%	52%	54%	46%	38%	32%	35%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:
Camping - Recreational Vehicles

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	POINTS
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		(Excl.
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		Europe)
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	2	6	2	12	1	6	1	9	1	12	33
Visitor Satisfaction Levels - NO DATA	3		0		0		0		0		0	0
Potential Market Size - NO DATA	5		0		0		0		0		0	0
Role of the Product as a Travel Motivator	5	3	15	3	30	3	30	3	45	3	60	120
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	5	6.25	5	12.5	5	12.5	5	18.75	5	25	50
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential	4	2	8	2	16	2	16	4	48	3	48	88
Multi-Season Potential												
Shoulder Season (May/June, Sept/Oct)	5	2	10	2	20	2	20	2	30	3	60	80
November to April	5	1	5	1	10	1	10	1	15	2	40	40
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		25	**50.8**	25	**101.5**	25	**95.5**	25	**167.3**	25	**247.0**	**415**
Score as % of a Perfect Score			41%		41%		38%		45%		49%	42%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	3	45	3	45	3	67.5	4	120	180
Latent Resource Quality/Potential	6	3	18	3	36	3	36	3	54	3	72	144
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		19.5	**58.5**	19.5	**117.0**	19.5	**117.0**	19.5	**175.5**	19.5	**264.0**	**468**
Score as % of a Perfect Score			60%		60%		60%		60%		68%	60%
TOTAL: MARKET AND PRODUCT CRITERIA		**44.5**	**109**	**44.5**	**219**	**44.5**	**213**	**44.5**	**343**	**44.5**	**511**	**883**
Score as % of a Perfect Score			49%		49%		48%		51%		57%	50%

NOTES:

REGIONAL COMMENTS

Cape Breton
Cabot Trail touring experience gives this region a strong USP; second highest supply of serviced campsites in the province.

Latent resource potential is good. Main constraint for further development of Recreational vehicles market is road conditions - narrow roads, steep hills, limited manoeuvring for large vehicles in small communities, etc.

South Shore
Quality touring experience throughout the south shore but narrow, winding roads limits appeal of this region somewhat. Moderate supply of serviced campsites.

Latent resource potential is good. Again, main constraint is road conditions.

Annapolis Valley
Quality touring experience - also reasonably highest supply of serviced campsites in the province.

Natural resource potential for touring not as strong as in some other regions.

Eastern Shore
Poor USP for touring, and winding roads make it a challenge for recreational vehicles; suitable campground product very limited

Natural resource potential for touring moderate quality but significant constraints due to road conditions and limited infrastructure.

Northumberland Shore
USP not strong for touring; moderate supply of serviced campsites.

Latent resource potential not as high quality as other regions.

No major constraints to growth.

Fundy Shore
USP not as strong for touring as other regions and narrow, winding roads a challenge for RV product; however, region has good supply of serviced campsites - primarily in the Truro/Glenholme/Shubenacadie area and is in a central location.

Variety of resources available from shoreline of Economy/Five Island area to interior, easily accessible locations close to highway. Good strategic location for touring campers.

No major constraints to growth.

Halifax Urban Area
Very limited supply of serviced campsites within the urban area though there is one well-known facility; USP weak due to limited product in this area to service this market.

Strength of Halifax as a destination suggests latent potential for this market but major constraint is lack of facilities.

CAMPING - RECREATIONAL VEHICLES

MARKET READINESS ISSUES

- Suitable campground facilities, open for longer seasons - March/April through November
- Availability of campgrounds with full services suitable for modern recreational vehicles - 30 - 50 amp power, septic systems, water, turning areas and large campsites
- Highway conditions

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Economic viability
- Financing
- Seasonality of demand

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- New/enhanced campgrounds able to accommodate new, large R Vs - pull through sites, wide roads/turning areas, 30 - 50 amp power at sites, water, sewage disposal systems
- Highway infrastructure able to accommodate these vehicles, e.g. on secondary roads need more pull-offs to let passing traffic by
- Communities need parking facilities that can accommodate RVs in downtown areas, at VICs, etc.

PRODUCT: CAMPING -TENT

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels; participation in "wilderness camping" since no data on tent camping*	2% participation rate; 10,600 persons **Score: 1**	5% participation rate; 13,500 persons **Score: 1**	10% participation rate; 6,200 persons **Score: 1**	3% participation rate 5,200 persons **Score: 1**	5% participation rate 1,700 persons Score: 1
Visitor Satisfaction Levels	N/A	N/A	N/A	N/A	N/A
Potential Market Size • *Data is from Parks Canada conversion study, indicating "camping" was type of experience they were seeking when planning this year's vacation* • *Applied to total person trips from the market, to or within Canada (inter-prov'l)*	7% Potential Market: 114.3 thousand person trips **Score: 1**	1% Potential Market: 35 thousand person trips **Score: 1**	25% Potential Market: 479.2 thousand person trips **Score: 2**	3% Potential Market: 122.1 thousand person trips **Score: 1**	12.4% Potential Market (France, Germany & UK): 287.2 thousand person trips **Score: 1**
Role as a Travel Motivator • *Data is from Parks Canada conversion study - see above*	7% **Score: 1**	1% **Score: 1**	29% **Score: 3**	3% **Score: 1**	N/A
Role as a Demand Supporter • *Comments are subjective*	Of interest/importance to part of the touring market Not important to the meetings/convention market or the urban destination market Of limited interest/importance as a supporting activity for the vacation destination market				
Growth Potential • *Data from US Forest Service Study; Increase in number of participants 1982-1994*	Increase in number of participants of 24% Score: 2; applied to all markets since data on the Canadian and European market is not available				
Multi-Season Potential - Shoulder • *Comments are subjective*	Some limited potential in the spring and fall, particularly from the regional market which is close by, and the European which is less weather-sensitive				
Multi-Season Potential - Nov to April • *Comments are subjective*	No potential in the November to April period except perhaps some minimal winter camping from regional marke				

<table>
<tr><th colspan="6">PRODUCT: CAMPING -TENT</th></tr>
<tr><th>CRITERIA</th><th>ATLANTIC CANADA</th><th>ONTARIO</th><th>QUEBEC</th><th>NEW ENGLAND MID-ATLANTIC</th><th>EUROPE</th></tr>
<tr><td colspan="6">PRODUCT CRITERIA</td></tr>
<tr><td>Current Unique Selling Proposition
• <i>Comments are subjective</i></td><td colspan="5">Province offers a variety of coastal camping opportunities as well as camping in Cape Breton Highlands and Kejimkujik National Park and a number of private facilities; however, province does not have as strong a USP fo camping as PEI or New Brunswick.</td></tr>
<tr><td>Latent Resource Quality/Potential
• <i>Comments are subjective</i></td><td colspan="5">Generally, good quality natural resources throughout the province suitable for camping, both in wilderness and semi-wilderness areas as well as in more accessible areas along touring routes.</td></tr>
<tr><td>Constraints to Growth
• <i>Comments are subjective</i></td><td colspan="5">No major constraints to further development other than availability of land for campgrounds, particularly in coastal areas.</td></tr>
</table>

REGIONAL SCORES

Camping - Tenting	**Average Prov'l Score**	**Cape Breton**	**South Shore**	**Annapolis Valley**	**Fundy Shore**	**Eastern Shore**	**Northumb. Shore**	**Halifax Urban**
		Score	Score	Score	Score	Score	Score	Score
Current USP	2.3	4	2	3	2	1	1	0
Latent Resource Quality	3	3	3	2	3	3	2	1
Constraints to Growth	3	3	3	3	3	3	3	1
Percent of Perfect Score	52%	68%	52%	54%	52%	45%	38%	12%

PRODUCT:
Camping - Tenting

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		POINTS (Excl. Europe)
Market Weight			1		2		2		3		4	
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size (1)	3	1	3	1	6	1	6	1	9	1	12	24
Visitor Satisfaction Levels NO DATA	3		0		0		0		0		0	0
Potential Market Size	5	1	5	1	10	2	20	1	15	1	20	50
Role of the Product as a Travel Motivator	5	1	5	1	10	3	30	1	15		0	60
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	2	2.5	2	5	3	7.5	2	7.5	2	10	23
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential	4	2	8	2	16	2	16	2	24	2	32	64
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	2	10	1	10	1	10	1	15	2	40	45
November to April	5	0	0	0	0	0	0	0	0	0	0	0
Market Awareness NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*30*	**34.0**	*30*	**58.0**	*30*	**90.5**	*30*	**87.0**	25	**116.0**	**270**
Score as % of a Perfect Score			**23%**		**19%**		**30%**		**19%**		**23%**	**22%**
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	2	15	2	30	2	30	2	45	3	90	120
Latent Resource Quality/Potential	6	3	18	3	36	3	36	3	54	3	72	144
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		*19.5*	**51.0**	*19.5*	**102.0**	*19.5*	**102.0**	*19.5*	**153.0**	*19.5*	**234.0**	**408**
Score as % of a Perfect Score			**52%**		**52%**		**52%**		**52%**		**60%**	**52%**
TOTAL: MARKET AND PRODUCT CRITERIA		**49.5**	**85**	**49.5**	**160**	**49.5**	**193**	**49.5**	**240**	**44.5**	**350**	**678**
Score as % of a Perfect Score			**34%**		**32%**		**39%**		**32%**		**39%**	**34%**

NOTES:

1. Existing size represents reported participation in 'wilderness camping' for 1996 Visitor Exit Survey, Canada origins refer to % of auto visitors only, excluding estimates for Amherst applied to proportion of auto visitors to the province (average of about 85% for non-resident visitors). US and European data refers to special run of the 1996 Visitor Exit Survey for combined auto and air visitors, excluding estimates for Amherst.

REGIONAL COMMENTS

Cape Breton
Strongest USP in the province due to product in Cape Breton Highlands National Park (both wilderness camping and more accessible sites) as well as a number of private campgrounds; largest supply of unserviced sites in the province.

Generally, good quality natural resource potential for camping.

No major constraints to growth.

South Shore
Not strong USP for camping; only limited supply of unserviced sites and a few provincial parks with camping - new Thomas Raddell facilities will help strengthen USP.

Generally, good quality natural resource potential for camping although availability of coastal/public land is a constraint for further development.

Annapolis Valley
Moderate USP for tent camping; second highest supply of unserviced sites in province; some unique/quality experiences such as Kejimkujik National Park, Blomidon Provincial Park.

Resource potential moderate - some limited coastal opportunities; some interior wilderness opportunities.

No major constraints to growth.

Eastern Shore
Limited USP - product is very limited - most of parks are day use only and only a very few private facilities.

Generally good quality natural resources for camping - both coastal areas and interior areas such as Tangier Grand area

No major constraints to growth

Northumberland Shore
Limited USP for camping; small supply of campgrounds and sites though some coastal camping experiences.

Resource quality moderate in terms of latent potential

No major constraints to growth

Fundy Shore
Moderate USP for tent camping - facilities in Five Island area and Truro area

Generally good quality natural resources for camping - latent potential in Cape Chignecto Provincial park for wilderness camping; also some other coastal areas.

No major constraints to growth.

Halifax Urban Area
Product very limited - no USP

Latent resource potential weak given nature of the region

Lack of suitable/available land creates major constraint to growth

CAMPING - TENTING

MARKET READINESS ISSUES
- Provincial and national parks that provide many of the tent camping opportunities have limited season of operation
- Quality of tenting areas at private campgrounds

COSTS/CHALLENGES TO FURTHER DEVELOPMENT
- Economic viability
- Seasonality of demand
- Financing

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES
- Improved quality of tenting areas at private campgrounds

PRODUCT: HISTORIC SITES

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels, for Museums/Historical Sites* • *Ont/Que data is for "other Canadians"*	12% participation rate; 79,800 persons **Score: 3**	43% participation rate; 145,100 persons **Score: 4**	43% participation rate; 33,100 persons **Score: 2**	56% participation rate 96,400persons **Score: 3**	50% participation rate 17,400 persons **Score: 1**
Visitor Satisfaction Levels • *Combination of data from NS Conversion Study ("visiting historic sites"); and Parks Canada on-site visitor surveys*	Conv: Study: 30% Pks Can Study:76% **Score : 4**	Conv: Study: 22% Pks Can Study:77% **Score: 3**	Conv: Study: 27% Pks Can Stdy:71% **Score: 3**	New England: 24% Mid Atlantic: 23% Pks. Can Study:94% **Score: 3**	N/A
Potential Market Size • *Data is from 1997 Conversion Study; % saying " visiting historic sites" was important to decision to visit most recent vacation destination* • *European data based on CTC Pleasure Travel Markets Study* • *Applied to total person trips from the market, to or within Canada (inter-prov'l).*	71% Potential Market: 1.16 million person trips **Score: 3**	77% Potential Market: 2.7 million person trips **Score: 5**	79% Potential Market: 1.5 million person trips **Score: 3**	75% Potential Market: 3.06 million person trips **Score: 5**	56.5% Potential Market (France, Germany & UK): 1.3 million person trips **Score: 3**
Role as a Travel Motivator • *Data is from 1997 Conversion Study; % saying " visiting historic sites" was important to decision to visit most recent vacation destination*	71% **Score: 4**	77% **Score: 5**	79% **Score: 5**	75% **Score: 5**	56.5% **Score: 4**
Role as a Demand Supporter • *Comments are subjective*	Clearly an important contributing factor in travel motivation and destination choice for the touring market Of interest/important to some of the meetings/convention market and the urban destination market, particularly those from outside the region Also of interest/importance as a supporting activity for the vacation destination market				
Growth Potential	Data from Canadian Travel Survey suggests declining visits but general market trends suggest increasing interest in these types of experiences. Estimated score of 2 for all markets.				

PRODUCT: HISTORIC SITES					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
Multi-Season Potential - Shoulder • *Comments are subjective*	Product has reasonably good appeal in spring/fall, (assuming it is available), in part because of appeal of cultural/heritage tourism to mature markets who are increasingly travelling in the shoulder seasons				
Multi-Season Potential - Nov to April • *Comments are subjective*	Some limited potential in the November to April period, particularly in Halifax in association with conferences/meetings, urban vacations, etc. for special events, and also for general interest market				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Nova Scotia has a strong USP in this product area, particularly for the Canadian market, with sites such as Fortress Louisbourg, Port Royal, Grand Pré				
Latent Resource Quality/Potential • *Comments are subjective*	Nova Scotia has high quality historic sites, particularly in the context of the Canadian market because of the rol of these sites in Canadian history; Resource quality not quite as appealing for US and European markets becaus there is not the connection to their history and, particularly in Europe, there are numerous more significant and much older historic sites				
Constraints to Growth • *Comments are subjective*	Very few constraints to growth that cannot be influenced				

REGIONAL SCORES

Historic Sites	**Average Prov'l Score**	**Cape Breton**	**South Shore**	**Annapolis Valley**	**Fundy Shore**	**Eastern Shore**	**Northumb. Shore**	**Halifax Urban**
		Score	Score	Score	Score	Score	Score	Score
Current USP	3.2	4	1	3	1	1	1	4
Latent Resource Quality	3.2	3	2	3	1	2	1	3
Constraints to Growth	4	3	2	3	1	2	1	3
Percent of Perfect Score	71%	68%	32%	60%	20%	32%	20%	68%

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PRODUCT:
Historic Sites

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		**POINTS (Excl. Europe)**
Market Weight			1		2		2		3		4	
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	3	9	4	24	2	12	3	27	1	12	72
Visitor Satisfaction Levels	3	4	12	3	18	3	18	3	27		0	75
Potential Market Size	5	3	15	5	50	3	30	5	75	3	60	170
Role of the Product as a Travel Motivator	5	4	20	5	50	5	50	5	75	4	80	195
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	4	5	4	10	4	10	4	15	4	20	40
- Meetings and Incentive Travel Market	0.75	1	0.75	2	3	2	3	2	4.5	2	6	11
- Urban Destination Market	0.5	1	0.5	2	2	2	2	2	3	2	4	8
- Vacation Destination Market	0.5	2	1	2	2	1	1	2	3	2	4	7
Growth Potential	4	2	8	2	16	2	16	2	24	2	32	64
Multi-Season Potential												
Shoulder Season (May/June, Sept/Oct)	5	3	15	3	30	3	30	3	45	3	60	120
November to April	5	2	10	1	10	1	10	1	15	1	20	45
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		33	**96.3**	33	**215.0**	33	**182.0**	33	**313.5**	30	**298.0**	**807**
Score as % of a Perfect Score			58%		65%		55%		63%		50%	61%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	4	30	4	60	3	45	3	67.5	3	90	203
Latent Resource Quality/Potential	6	4	24	4	48	3	36	3	54	3	72	162
Product Potential - Constraints/Capacity for Growth	6	4	24	4	48	4	48	4	72	4	96	192
Sub total: Product Related Criteria		19.5	**78.0**	19.5	**156.0**	19.5	**129.0**	19.5	**193.5**	19.5	**258.0**	**557**
Score as % of a Perfect Score			80%		80%		66%		66%		66%	71%
TOTAL: MARKET AND PRODUCT CRITERIA		52.5	**174**	52.5	**371**	52.5	**311**	52.5	**507**	49.5	**556**	**1363**
Score as % of a Perfect Score			66%		71%		59%		64%		56%	65%

NOTES:

REGIONAL COMMENTS

Cape Breton
Fortress Louisbourg and Alexander Graham Bell NHS give a strong USP

Latent resource potential for further development more limited - major resources already developed; but existing sites have potential to be strengthened as tourism products.

No major constraints to further development of existing product; limited resources a constraint for new product.

South Shore
USP currently very limited - very little product.

Latent resource potential moderate - a number of sites with special interest appeal that could be developed such as Le Have (site of first Acadian settlement); Birchtown

Character and extent of resources for further development is a constraint.

Annapolis Valley
Strong USP at present - a number of sites - Fort Anne, Port Royal, Grand Pré

Existing sites have potential for further growth/development especially Grand Pré; also for adding living history elements at the other sites; resource potential for new sites is limited.

No major constraints to development

Eastern Shore
Existing USP low - Grassy Island NHS very limited experience. (Sherbrooke Village considered in Major Museum product category)

Some limited resource potential for further development of existing sites; limited opportunity for new product. Limited historical resources a constraint to further development.

Northumberland Shore
Current USP virtually non-existent.

Very little in way of resources on which to build.

Lack of resources a major constraint to future development.

Fundy Shore
Current USP virtually non-existent.

Very little in way of resources on which to build; some potential in Debert area but fits better under museum/interpretive centre product.

Lack of resources a major constraint to future development.

Halifax Urban Area
Strong USP at present - Halifax Citadel NHS; Pier 21; Georges Island NHS

Some quality resources and stories to build on and further develop the product including Georges Island, Halifax - Canada's East Coast Navy town; Fort Needham, etc.

No major constraints to further development.

HISTORIC SITES

MARKET READINESS ISSUES

- Number of high quality historic sites but are not developed/programmed to their potential from a tourism perspective - variety of opportunities to increase their role in generating tourism activity, increasing length of stay, creating new markets, etc.
- Hours and season of operation (with full programming) need to be longer and more flexible to accommodate the motorcoach sector

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Budgets a major constraint to increased programming and operating season - challenge is to develop an approach for involving outside groups/businesses in delivering appropriate programs using the built resources that exist
- Pressures to increase revenues/decrease costs will impact ability to respond to needs, particularly longer season/hours of operation
- Pressure on staff resources (declining budgets, staff levels) makes it difficult to address new opportunities
- Need to identify the types of experiences and locations where they are most likely to succeed and place priority on making something happen
- Program of infrastructure investment to assist heritage institutions with potential to upgrade visitor amenities
- Creating more of a direct link between culture/heritage and tourism businesses

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Develop spring/fall special events at attractions to extend season, e.g. at Grand Pré
- Increased programming and "living" interpretation at historic sites generally. Examples that have been suggested include:
  - Candlelight tours/dinners at sites such as Louisbourg
  - Order of Good Cheer Dinners at Port Royal
  - Major "Pageant" at Halifax Citadel
  - Theatrical performances using the historic sites as venues
- More entertainment during day and evening, and in spring and fall
- More evening programming
- Continued expansion of opportunities for on-site revenue generation, either through extended stay to justify increased admission or more things to spend money on - more animation
- Additional special events and programs
- Extended operating season with full programming
- Maximize utilization of resources available through museums/historic sites to help entrepreneurs develop cultural and natural heritage experiences/packages/programs
- Expanded/improved staff training to make visitor experience more personal
- Packaging of information on historic sites with other attractions, experiences in the local area
- See other comments under Museums/Interpretive Centres/Galleries

PRODUCT: MAJOR MUSEUMS/INTERPRETIVE FACILITIES/GALLERIES

(Includes: Fisheries Museum of the Atlantic, Maritime Museum, Alexander Graham Bell NHS, NS Museum of Natural History, Art Gallery of Nova Scotia, Sherbrooke Village and NS Museum of Industry

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels, for Museums/Historical Sites* • *Ont/Que data is for "other Canadians"*	12% participation rate; 79,800 persons **Score: 3**	43% participation rate; 145,100 persons **Score: 4**	43% participation rate; 33,100 persons **Score: 2**	56% participation rate 96,400 persons **Score: 3**	50% participation rate 17,400 persons **Score: 1**
Visitor Satisfaction Levels • *Data from NS Conversion Study; % saying "visiting museums" is much better than elsewhere*	19% **Score : 1**	12% **Score: 1**	21% **Score: 2**	New England: 13% Mid Atlantic: 12% **Score: 1**	N/A
Potential Market Size • *Data is from 1997 Conversion Study; % saying "museums/interpretive centres" was important to decision to visit most recent vacation destination* • *Data on Europe based on CTC Pleasure Travel Market studies* • *Applied to total person trips from the market, to or within Canada (inter-prov'l)*	52% Potential Market: 849.2 thousand person trips **Score: 2**	60% Potential Market: 2.1 million person trips **Score: 4**	56% Potential Market: 1.5 million person trips **Score: 3**	49.9% Potential Market: 2.0 million person trips **Score: 4**	48% Potential Market (France, Germany & UK): 1.1 million person trips **Score: 3**
Role as a Travel Motivator • *Data is from 1997 Conversion Study; % saying "museums/interpretive centres" was important to decision to visit most recent vacation destination*	52% **Score: 4**	60% **Score: 4**	56% **Score: 4**	49.9% **Score: 3**	N/A
Role as a Demand Supporter • *Comments are subjective*	An important factor in travel motivation for the touring market, and high levels of participation, particularly for the Ontario, Quebec and New England markets Major museums in Halifax area also of some interest to the meetings and incentive travel market, as well as the urban destination market; Product of importance to part of the vacation destination market as well.				

PRODUCT: MAJOR MUSEUMS/INTERPRETIVE FACILITIES/GALLERIES

(Includes: Fisheries Museum of the Atlantic, Maritime Museum, Alexander Graham Bell NHS, NS Museum of Natural History, Art Gallery of Nova Scotia, Sherbrooke Village and NS Museum of Industry

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Growth Potential • *Estimate based on several sources re growth in cultural and heritage tourism*	Cultural and heritage tourism expected to increase at 15% per year until 2000; according to World Tourism Organization. **Estimated Score: 2** for all markets				
Multi-Season Potential - Shoulder • *Comments are subjective*	Reasonably good potential in spring and fall; product is not weather sensitive, appeals to the mature market segment which tends to travel at this time of year. Special exhibits in particular have potential to contribute to generating trips				
Multi-Season Potential - Nov to April • *Comments are subjective*	Some modest potential in November to April, particularly for the regional market. Potential strengthened by special exhibits.				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Strong USP particularly in Atlantic Canada; less so for US and European markets since NS product not comparable to major museums in other destinations and themes are more local/national in character; USP strengthened by Titanic story at Maritime Museum; other strong products include Fisheries Museum; Alexander Graham Bell NHS;				
Latent Resource Quality/Potential • *Comments are subjective*	Some quality resources/themes with potential that are still un/underdeveloped and interpreted such as Fundy tides; Oak Island story, marine life, also cultural themes, natural history, coal mining and other stories that could form basis for "blockbuster" exhibits at existing facilities, such as Dinosaurs				
Constraints to Growth • *Comments are subjective*	No major constraints to development - natural, heritage, cultural resources are present; major challenge is fiscal resources				

REGIONAL SCORES

Museums: Large/ Significant	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	3.5	3	3	0	2	2	2	4
Latent Resource Quality	4	3	2	1	2	1	2	3
Constraints to Growth	3	3	3	1	3	1	2	3
Percent of Perfect Score	72%	60%	54%	12%	46%	28%	40%	68%

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PRODUCT:

Major Museums

(including Fisheries Museum of the Atlantic, Maritime Museum of the Atlantic, Alexander Graham Bell National Historic Site, N S. Museum of Natural History, Sherbrooke Village, N S. Museum of Industry)

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		**POINTS (Excl. Europe)**
Market Weight			1		2		2		3		4	
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	3	9	4	24	2	12	3	27	1	12	72
Visitor Satisfaction Levels	3	1	3	1	6	2	12	1	9	0	0	30
Potential Market Size	5	2	10	4	40	3	30	4	60	3	60	140
Role of the Product as a Travel Motivator	5	4	20	4	40	4	40	3	45		0	145
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	3	3.75	4	10	4	10	4	15	3	15	39
- Meetings and Incentive Travel Market	0.75	1	0.75	1	1.5	1	1.5	1	2 25	1	3	6
- Urban Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
- Vacation Destination Market	0.5	2	1	2	2	2	2	2	3	2	4	8
Growth Potential	4	2	8	2	16	2	16	2	24	2	32	64
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	3	15	3	30	3	30	3	45	2	40	120
November to April	5	2	10	1	10	1	10	1	15	1	20	45
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		33	**81.0**	33	**180.5**	33	**164.5**	33	**246.8**	28	**188.0**	**673**
Score as % of a Perfect Score			49%		55%		50%		50%		34%	51%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	5	37.5	4	60	4	60	3	67.5	3	90	225
Latent Resource Quality/Potential	6	4	24	4	48	4	48	4	72	4	96	192
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		*19.5*	**79.5**	*19.5*	**144.0**	*19.5*	**144.0**	*19.5*	**193.5**	*19.5*	**258.0**	**561**
Score as % of a Perfect Score			82%		74%		74%		66%		66%	72%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**161**	**52.5**	**325**	**52.5**	**309**	**52.5**	**440**	**47.5**	**446**	**1234**
Score as % of a Perfect Score			61%		62%		59%		56%		47%	59%

NOTES:

REGIONAL COMMENTS

Cape Breton
Moderate USP - some strong/unique product such as Alexander Graham Bell, Glace Bay Miner's Museum

Variety of natural heritage and historic resources which could form basis for new product, e.g. coal theme, Bras'D'Or Lakes. No major constraint to further development.

South Shore
Moderate USP - some strong/unique product - Fisheries Museum of the Atlantic, Shelburne

Moderate quality resources for further development - probably more suitable for smaller museums/interpretive centres such as Oak Island story, Acadian settlement in Le Have area. No major constraints to development

Annapolis Valley
No USP at present - no major museum product

Limited latent resource potential for major museums; more suited to interpretation such as Fundy Tides. Limited resource potential a constraint to further development.

Eastern Shore
Limited USP since only one product - Sherbrooke Village

Limited latent resource potential for major museums though maybe some potential for further development/programs at Sherbrooke Village. Limited resource potential a constraint to further development.

Northumberland Shore
Limited USP since only one product - Museum of Industry

Limited latent resource potential for major museums. Limited resource potential a constraint to further development.

Fundy Shore
Limited USP since only one product - Fundy Geological Museum

Some latent resource potential for further product associated with the Fundy Shore - major interpretive centre? No major constraints to further development.

Halifax Urban Area
Strong USP based on existing product - Maritime Museum of the Atlantic, Museum of Natural History, Art Gallery of Nova Scotia

Moderate resource potential for further development - a number of stories that could be told through existing facilities and become major products - e.g. Dinosaurs, Halifax's role in Canada's east coast navy; Halifax Defence story,

No major constraints to further development.

MUSEUMS, INTERPRETIVE CENTRES, GALLERIES

(Major and small)

MARKET READINESS ISSUES

- Significant number of facilities, distributed across the province but quality varies
- Facilities exist on a continuum from major museums/historic sites down to individual heritage buildings and plaques (federal, provincial and municipal/community facilities but they visitors are not made aware of the richness of the resource because the facilities and experiences are not clustered/linked, packaged or promoted together
- Numerous opportunities to enhance visitor experiences through programming, "living history", etc.etc.
- Hours and season of operation (with full programming) need to be longer and more flexible to accommodate the motorcoach sector

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Budgets a major constraint to increased programming and operating season - challenge is to develop an approach for involving outside groups/businesses in delivering appropriate programs using the built resources that exist
- Program of infrastructure investment to assist heritage institutions with potential to upgrade visitor amenities
  - Many community museums are not tourist attractions, due to their narrow focus on specific subject or community; quality of display, artifacts, interpretation, etc.
  - Linking facilities/programs and promoting to visitors as a package or interwoven experience
  - Creating more of a direct link between culture/heritage and tourism businesses

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Collaboration among heritage facilities to provide coordinated directional signage, packaged admission tickets, coordinated operating schedules, joint promotional efforts
- Create a publication that integrates the whole range of cultural/heritage experiences in the province, from major historic sites/museums down to built heritage, architecture, etc. - a "cultural touring guide?"
- Enhanced displays and interpretation including more living history and animation, partnerships between museums and other cultural groups such as theatre groups who could "bring the theatre into museums", heritage meals, etc.
- Enhance community museums with more training on displays, interpretation, the types of experiences of interest to visitors, etc. and support for efforts that respond to these opportunities
- More evening programming
- Extended operating season and hours of operation
- Possible new facilities - Natural History Interpretive Centre; Interpretation of Coal Mining in NS through several different sites/locations (Stellarton, Cape Breton, Springhill)
- More packaging of cultural/heritage products with accommodation, food, entertainment
- More "blockbuster" events, e.g. Dinosaur display, that could be used to help generate demand in shoulder and November to May period
- Maximize utilization of resources available through museums/historic sites to help entrepreneurs develop cultural and natural heritage experiences/packages/programs

PRODUCT: SMALL MUSEUMS/INTERPRETIVE CENTRES/ART GALLERIES

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels, for Museums/Historical Sites* • *Ont/Que data is for "other Canadians*	12% participation rate; 79,800 persons **Score: 3**	43% participation rate; 145,100 persons **Score: 4**	43% participation rate; 33,100 persons **Score: 2**	56% participation rate 96,400 persons **Score: 3**	50% participation rate 17,400 persons **Score: 1**
Visitor Satisfaction Levels • *Data from NS Conversion Study: % saying "visiting museums" is much better than elsewhere*	19% **Score : 1**	12% **Score: 1**	21% **Score: 2**	New England: 13% Mid Atlantic: 12% **Score: 1**	N/A
Potential Market Size • *Scores estimated, based on calculations for Major Museums*	**Score: 1**	**Score: 2**	**Score: 1**	**Score: 2**	**Score: 2**
Role as a Travel Motivator • *Score estimated based on calculations for Major Museums*	**Score: 2**	**Score: 2**	**Score: 2**	**Score: 1**	N/A
Role as a Demand Supporter • *Comments are subjective*	Small museums/interpretive centres are of some interest to portions of the touring market Not important to the meetings/convention market but potentially of limited interest to the urban destination market, although product in Halifax area is limited - Art Gallery of Nova Scotia is the main product Limited importance as a supporting activity for the vacation destination market				
Growth Potential • *Estimate based on several sources re growth in cultural and heritage tourism*	Cultural and heritage tourism expected to increase at 15% per year until 2000; according to World Tourism Organization. **Estimated Score: 2** for all markets				Estimated at same score as North America
Multi-Season Potential - Shoulder • *Comments are subjective*	Some appeal to segments of the market with an interest in cultural/heritage experiences, particularly markets from Ontario and Quebec which show a higher level of interest in the museum product, as evidenced by participation levels and role as a travel motivator. Potential constrained to some extent by season of operation.				
Multi-Season Potential - Nov to April • *Comments are subjective*	Very limited potential in this period; limited open facilities is a constraint.				

PRODUCT: SMALL MUSEUMS/INTERPRETIVE CENTRES/ART GALLERIES

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Large number of small museums/interpretive centres across the province but quality, extent of collections/displays and strength of the stories told varies significantly across the province; USP seen to be slightly stronger in Ontario market - greater interest in history/culture, but lower in Quebec, US and overseas market because of lower interest in this product and weaker product				
Latent Resource Quality/Potential • *Comments are subjective*	A variety of themes and resources exist around the province on which to base new product. These include historic/heritage themes, cultural themes, architectural heritage, natural heritage, etc.				
Constraints to Growth • *Comments are subjective*	Major constraint to future development of smaller museums/interpretive centres is mobilizing the effort and community groups to work on product development, and ensuring that products provide quality interpretation and experiences.				

REGIONAL SCORES

Smaller Museums/ Interpretive Centres	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	1.6	2	3	3	2	1	1	2
Latent Resource Quality	3	3	3	3	4	1	3	3
Constraints to Growth	2	2	3	3	2	2	3	3
Percent of Perfect Score	45%	46%	60%	60%	52%	26%	45%	52%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:

Small Museums/Interpretive Centres

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	POINTS
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		(Excl.
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		Europe)
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	3	9	4	24	2	12	3	27	1	12	72
Visitor Satisfaction Levels	3	1	3	1	6	2	12	1	9	0	0	30
Potential Market Size	5	1	5	2	20	1	10	2	30	2	40	65
Role of the Product as a Travel Motivator	5	2	10	2	20	2	20	1	15		0	65
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	2	2.5	2	5	2	5	2	7.5	2	10	20
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential	4	2	8	2	16	2	16	2	24	2	32	64
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	1	5	2	20	2	20	1	15	1	20	60
November to April	5	1	5	0	0	0	0	0	0	0	0	5
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		33	**48.5**	33	**113.0**	33	**97.0**	33	**130.5**	28	**118.0**	**389**
Score as % of a Perfect Score			29%		34%		29%		26%		21%	29%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	2	15	3	45	2	30	1	22.5	1	30	113
Latent Resource Quality/Potential	6	3	18	3	36	3	36	3	54	3	72	144
Product Potential - Constraints/Capacity for Growth	6	2	12	2	24	2	24	2	36	2	48	96
Sub total: Product Related Criteria		19.5	**45.0**	19.5	**105.0**	19.5	**90.0**	19.5	**112.5**	19.5	**150.0**	**353**
Score as % of a Perfect Score			46%		54%		46%		38%		38%	45%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**94**	**52.5**	**218**	**52.5**	**187**	**52.5**	**243**	**47.5**	**268**	**742**
Score as % of a Perfect Score			36%		42%		36%		31%		28%	35%

NOTES:

REGIONAL COMMENTS

Cape Breton
Fewer small museums/interpretive centres than other parts of the province; weaker USP

Some natural heritage, cultural and heritage resources that could form the basis for additional product, such as music, Bras d'Or Lakes though not as extensive as other parts of the province.

No major constraints to development other than nature/quality of resources available for development and availability of groups to take development lead.

South Shore
Moderate USP - number of small museums and interpretive centres throughout the south shore region.

Some cultural, heritage and natural heritage resources that could form the basis of additional product; examples include architectural heritage, small fishing communities, Acadian and Black cultural themes.

No major constrains to development other than availability of groups to take development lead.

Annapolis Valley
Moderate USP - number of small museums and interpretive centres throughout the region.

Some cultural, heritage and natural heritage resources that could form the basis of additional product; examples include Bay of Fundy related natural features and marine life; architectural heritage, Acadian cultural themes.

No major constrains to development other than availability of groups to take development lead.

Eastern Shore
Very limited product - Fisherman's Life museum in Jeddore, museums in Canso and Guysborough; weak USP

Cultural, heritage themes/resources with potential for development are limited

Limited resources are major constraint to development; also availability of groups to take development lead.

Northumberland Shore
Limited product/USP. - major one with widespread appeal is Hector Heritage Quay; a number of small community museums, McCulloch House Museum.

Cultural, heritage themes/resources with potential for development are limited

Availability of suitable resources are a constraint to development; also availability of groups to take development lead.

Fundy Shore
Some existing product such as Joggins Fossil Centre, Parrsboro Rock Museum, Age of Sail Heritage Centre, Mastodon Ridge Showcase, Cape d'Or Lighthouse, Lawrence House Museum, Joy Laking Gallery

Variety of natural heritage stories that could be further interpreted (dinosaurs, fossils, Fundy tides, bird species) as well as cultural heritage.

No major constraints to development other than nature/quality of resources available for development and availability of groups to take development lead.

Halifax Urban Area
Some existing product but limited given the range of heritage/cultural themes that could be developed.

Wide range of resources that could be developed further, also existing product could be a much stronger product through programming, marketing

See Market Readiness, Costs/challenges to Further Development And Development Opportunities Under Major Museums

PRODUCT: CRAFTS					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels: "visit craft shops"* • *Ont/Que data is for "other Canadians*	25% participation rate; 166,200 persons **Score: 4**	55% participation rate; 185,600 persons **Score: 4**	55% participation rate; 42,300 persons **Score: 2**	61% participation rate 105,000 persons Score: 4	54% participation rate 18,800 persons **Score: 1**
Visitor Satisfaction Levels	N/A	N/A	N/A	N/A	N/A
Potential Market Size • *No data available in Conversion Study* • *NB on-site survey indicates crafts is a travel motivating factor for 25% of Ontario market -used as a basis to estimate scores*	**Estimated Score: 1**	25% Potential Market: 877 thousand person trips **Score: 2**	**Estimated Score: 1**	**Estimated Score: 2**	**Estimated Score: 1**
Role as a Travel Motivator • *Score estimated based on data above*	**Estimated Score: 1**	**Score: 2**	**Estimated Score: 2**	**Estimated Score: 1**	**Estimated Score: 1**
Role as a Demand Supporter • *Comments are subjective*	Plays a limited role in strengthening the appeal of NS for part of the touring market, particularly those from outside the regional marketplace. Likewise for the urban destination market and the vacation destination market. Not a contributing factor in strengthening appeal for meetings and convention market.				
Growth Potential • *No data; scores estimated*	Estimated score for all markets: 1				
Multi-Season Potential - Shoulder • *Comments are subjective*	Have some appeal/potential to contribute to generating shoulder season travel, particularly in the fall with the Craft Rally in early October, although market of travellers that might be attracted by this is fairly small, it has strong potential as a demand supporter for this period				
Multi-Season Potential - Nov to April • *Comments are subjective*	Some potential to generate trips in the pre-Christmas period for Xmas craft sales, from the regional market and also from the European market (Icelandair shopping packages)				
PRODUCT CRITERIA					

PRODUCT: CRAFTS

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Current Unique Selling Proposition • *Comments are subjective*	Nova Scotia is known for its crafts; Studio Craft Rally gaining increasing recognition; numerous craft shops and craftspeople/artists throughout the province with product available for sale and also learning experiences; Several well-established fall/Xmas craft shows.				
Latent Resource Quality/Potential • *Comments are subjective*	Latent resource quality is good - province has a number of high-skilled crafts people, making quality product and with a wide variety of different types. Considerable potential to build on these resources to create a more stronger product for tourism.				
Constraints to Growth • *Comments are subjective*	There are very few, if any, constraints to growth that cannot be easily influenced.				

REGIONAL SCORES

Crafts	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	3	3	4	3	2	1	2	3
Latent Resource Quality	3	3	4	3	3	2	3	3
Constraints to Growth	4	3	4	3	3	2	3	4
Percent of Perfect Score	66%	60%	80%	60%	52%	32%	52%	66%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:

Crafts

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	**POINTS (Excl. Europe)**
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	4	12	4	24	2	12	4	36	1	12	84
Visitor Satisfaction Levels - NO DATA	3		0		0		0		0		0	0
Potential Market Size	5	1	5	2	20	1	10	2	30	1	20	65
Role of the Product as a Travel Motivator	5	1	5	2	20	2	20	1	15	1	20	60
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	1	1.25	2	5	2	5	2	7.5	2	10	19
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential	4	1	4	1	8	1	8	1	12	1	16	32
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	2	10	2	20	2	20	2	30	2	40	80
November to April	5	2	10	0	0	0	0	0	0	1	20	10
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*30*	**48.3**	*30*	**99.0**	*30*	**77.0**	*30*	**133.5**	*30*	**142.0**	**358**
Score as % of a Perfect Score			32%		33%		26%		30%		24%	30%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	3	45	3	45	3	67.5	3	90	180
Latent Resource Quality/Potential	6	3	18	3	36	3	36	3	54	3	72	144
Product Potential - Constraints/Capacity for Growth	6	4	24	4	48	4	48	4	72	4	96	192
Sub total: Product Related Criteria		*19.5*	**64.5**	*19.5*	**129.0**	*19.5*	**129.0**	*19.5*	**193.5**	*19.5*	**258.0**	**516**
Score as % of a Perfect Score			66%		66%		66%		66%		66%	66%
TOTAL: MARKET AND PRODUCT CRITERIA		**49.5**	**113**	**49.5**	**228**	**49.5**	**206**	**49.5**	**327**	**49.5**	**400**	**874**
Score as % of a Perfect Score			46%		46%		42%		44%		40%	44%

NOTES:

REGIONAL COMMENTS

Cape Breton
Moderate number and variety of crafts people; opportunity to buy retail more scattered than other regions - not as readily available to visitors.

Moderate quality and range of crafts experiences with product of interest to visitors.

No major constraints to further development.

South Shore
Largest number and variety of crafts people and retail outlets; several communities with strong "craft" presence e.g. Mahone Bay, Lunenburg

Wide range and variety of crafts people in this region, on which to build product.

No constraints to further development.

Annapolis Valley
Moderate number and variety of crafts people; number of communities with concentration of craft shops, e.g. Bear River

Moderate quality and range of crafts experiences with product of interest to visitors.

No major constraints to further development

Eastern Shore
Existing product very limited, only a few opportunities to purchase crafts. Some product available through Sherbrooke Village store.

Resource potential only limited - small population base, limited number of craftspeople particularly those making high quality product of interest to visitor markets.

Limited number/variety/quality of crafts people a major constraint to further development.

Northumberland Shore
Limited number and variety of crafts people

Moderate quality and range of crafts people with product of interest to visitors.

No major constraints to further development

Fundy Shore
Limited number and variety of crafts people

Moderate quality and range of crafts people with product of interest to visitors.

No major constraints to further development

Halifax Urban Area
Good variety of craft product in this area, both in retail stores (e.g. Jennifer's), at Brewery Market, and at individual studios; Also home to major craft shows in both summer and fall.

Good quality and variety of crafts people with product of interest to visitors.

No constraints to further development.

CRAFTS

MARKET READINESS ISSUES

- Wide range of crafts people, craft outlets, etc. available but not necessarily readily accessible to visitors

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Diverse nature of this sector - almost exclusively small business and much of it part-time/seasonal in nature
- Getting craft products "to" visitor markets

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Establish additional "Economuseums"
- More outlets offering Nova Scotia crafts and/or more promotion of stores that offer these products
- Extend use of tools such as Studio Rally Map to get more tourists into places crafts are made
- Establish an identity program for Made in Nova Scotia high quality cultural products (for in-province and export markets)
- Offer the Studio Rally program twice a year, and include promotional literature in spring/fall fulfilment packages that are distributed by tourism
- Explore expanded role for NS Centre for Craft and Design in helping visitors access rural crafts people
- Learning vacation programs based around variety of arts/crafts
- Museums/historic sites work with local crafts people to develop product lines that could be made locally and sold at museums/sites.

PRODUCT: MUSIC

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1997 Conversion study for "attend a live music event" reduced by the average 'overstatement' factor calculated for activities where both Exit and Conversion study data is available*	7.8% participation rate; 51,800 persons **Score: 3**	16.8% participation rate; 56,700 persons **Score: 3**	12.9% participation rate; 9,900 persons **Score: 1**	15% participation rate 25,800 persons **Score: 2**	20% participation rate 6,900 persons **Score: 1**
Visitor Satisfaction Levels • *Data from NS Conversion Study: % saying "attending a live music event" is much better than elsewhere*	40% **Score : 4**	26% **Score: 2**	24% **Score: 2**	New England: 17% Mid Atlantic: 18% **Score: 1**	N/A
Potential Market Size • *Data is from International Year of Music Research and Conversion Study;* • *Applied to total person trips from the market, to or within Canada (inter-provincial)*	26% Potential Market: 424.6 thousand person trips **Score: 2**	23% Potential Market: 806.8 thousand person trips **Score: 2**	22.5% Potential Market: 431.3 thousand person trips **Score: 2**	17.8% Potential Market: 724.3 thousand person trips **Score: 2**	**Estimated Score: 1**
Role as a Travel Motivator • *Data is from International Year of Music Research and 1997 Conversion Study*	26% **Score: 2**	23% **Score: 2**	22.5% **Score: 2**	17.8% **Score: 2**	**Estimated Score: 1**
Role as a Demand Supporter • *Comments are subjective*	Important activity for much of the touring market - 53% of those surveyed in International Year of Music indicated opportunity to attend music events would help make decision to visit NS Of limited importance in strengthening the appeal of Nova Scotia for meetings and incentive travel market, urban destination market and vacation destination market				
Growth Potential • *No data available*	N/A				
Multi-Season Potential - Shoulder • *Comments are subjective*	Reasonably good potential to contribute to generating trips in the shoulder period, particularly for events such as Celtic Colours				

PRODUCT: MUSIC

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Multi-Season Potential - Nov to April • *Comments are subjective*	Likewise potential in November to April period, particularly from the Atlantic regional market, for special events, high profile musicians, East Coast Awards, etc.				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	High regional and national and increasing international recognition, for various Celtic, Acadian and folk artists; also Halifax recognition for "new music". Also a number of events with increasing profile, such as Celtic Colours, Jazz Festival, Scotia Festival of Music. USP increasing in all these areas.				
Latent Resource Quality/Potential • *Comments are subjective*	High quality existing resources related to music - solo and group artists with international profile and recording contracts; potential to use these resources to strengthen role of music as demand generator for visitors, particularly in the shoulder and winter season.				
Constraints to Growth • *Comments are subjective*	There are very few, if any, constraints to growth that cannot be influenced				

REGIONAL SCORES

Music Events	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	2.25	4	2	1	1	2	1	4
Latent Resource Quality	2.9	4	2	2	1	1	1	4
Constraints to Growth	4	3	3	2	2	2	2	4
Percent of Perfect Score	64%	74%	46%	32%	26%	34%	26%	80%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY
PRODUCT:
Music (represents live music events)

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL POINTS (Excl. Europe)**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	3	9	3	18	1	6	2	18	1	12	51
Visitor Satisfaction Levels	3	4	12	2	12	2	12	1	9		0	45
Potential Market Size (1)	5	2	10	2	20	2	20	2	30	1	20	80
Role of the Product as a Travel Motivator (1)	5	2	10	2	20	2	20	2	30	1	20	80
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	3	3.75	2	5	2	5	2	7.5	2	10	21
- Meetings and Incentive Travel Market	0.75	1	0.75	1	1.5	1	1.5	1	2.25	1	3	6
- Urban Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential - NO DATA	4		0		0		0		0		0	0
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	3	15	2	20	2	20	2	30	0	0	85
November to April	5	3	15	2	20	2	20	1	15	0	0	70
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*29*	**76.5**	*29*	**118.5**	*29*	**106.5**	*29*	**144.8**	*26*	**69.0**	**446**
Score as % of a Perfect Score			**53%**		**41%**		**37%**		**33%**		**13%**	**38%**
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	3	45	2	30	2	45	2	60	143
Latent Resource Quality/Potential	6	4	24	4	48	3	36	3	54	2	48	162
Product Potential - Constraints/Capacity for Growth	6	4	24	4	48	4	48	4	72	4	96	192
Sub total: Product Related Criteria		*19.5*	**70.5**	*19.5*	**141.0**	*19.5*	**114.0**	*19.5*	**171.0**	*19.5*	**204.0**	**497**
Score as % of a Perfect Score			**72%**		**72%**		**58%**		**58%**		**52%**	**64%**
TOTAL: MARKET AND PRODUCT CRITERIA		**48.5**	**147**	**48.5**	**260**	**48.5**	**221**	**48.5**	**316**	**45.5**	**273**	**943**
Score as % of a Perfect Score			**61%**		**54%**		**45%**		**43%**		**30%**	**49%**

NOTES:

1. Represents a ranking of importance of 2.4 out of 4 for 'live performing arts' for the European market. Represents rating of importance of having a wide variety of music and music-related events available at the destination for Canada and U.S. markets.

REGIONAL COMMENTS

Cape Breton
Strong USP due to several artists - Natalie McMaster, Ashley McIsaac, Rita McNeil, the Rankings, and increasing profile of Celtic Colours Festival.

Excellent quality resources to build product on, number of existing festivals and events that could be strengthened in terms of tourism appeal.

No major constraints to further development.

South Shore
USP not as well established as Cape Breton; artists do not have current strength/market recognition.

Resource quality moderate - some existing resources to build on such as Acadian music; also Hank Snow story

No major constraints to further development.

Annapolis Valley
No USP for music; limited product compared to other parts of the province.

Resource potential limited in terms of artists to build product on; some potential with Acadian music?

Limited resources a constraint to further development.

Eastern Shore
Limited USP for music - only notable product is Stan Rogers and festival in Canso.

No significant resources on which to build product.

Lack of resources a major constraint to further development.

Northumberland Shore
Limited USP for music; some Celtic associated with Scottish heritage in the area.

No significant resources on which to build product.

Lack of resources a major constraint to further development.

Fundy Shore
USP associated with primarily with one artist - Anne Murray who has international recognition.

Some limited resource potential for further development.

No major constraints for further development.

Halifax Urban Area
Strong USP; recognition for festivals, concerts, a number of "home grown" bands such as Sloan; also benefits from recognition of Celtic artists such as Natalie McMaster.

High quality resource potential - wide variety and scope to draw on, ranging from Rap to Classical music; existing festivals that could be expanded; has the range of infrastructure necessary to support further development of music as a tourism product.

No constraints to further development.

MUSIC

MARKET READINESS ISSUES

- Wide array of resources exist, as well as concerts, shows, festivals, etc. but often not promoted to visitors and music industry doesn't necessarily recognize potential contribution of tourist markets - need for more co-operative efforts between music community and tourism community to take advantage of the opportunity that exists

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- No major costs/challenges identified

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Establish an Atlantic Canada Music centre as part of the East Coast Music Awards program
- Establish a provincial Acadian Music Festival
- Entertainment based packages for November to April period in Halifax - based around major concerts, festivals, etc.
- Incorporate several different cultural/entertainment elements into packages - music, theatre, heritage experiences
- Music learning vacations
- Theatre/concert based packages in Halifax area in November to April
- Encourage cooperative efforts, packaging, joint promotion between music community and tourism community
- Incorporate a music event (Celtic?) as part of a major March Break festival including blockbuster show at the Museum of Natural History, theatre, dining (lobster?), etc.

PRODUCT: THEATRE					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1997 Conversion study for "attend a live music event" reduced by the average 'overstatement' factor calculated for activities where both Exit and Conversion study data is available*	5.2 participation rate; 34,600 persons **Score: 2**	9% participation rate; 30,400 persons **Score: 2**	5.6% participation rate; 4,300 persons Score: 1	9.8% participation rate 16,900 persons **Score: 1**	6% participation rate 2,100 persons **Score: 1**
Visitor Satisfaction Levels • *Data from NS Conversion Study: % saying "live theatre events" were much better than elsewhere*	17% **Score : 1**	30% **Score: 3**	30% **Score: 3**	New England: 27% Mid Atlantic: 0% **Score: 1**	N/A
Potential Market Size • *Data is from 1997 Conversion Study: % saying "live theatre events" was important to decision to visit most recent vacation destination* • *European data is from CTC Pleasure Travel Market Studies* • *Applied to total person trips from the market, to or within Canada (inter prov'l)*	24% Potential Market: 391.9 thousand person trips **Score: 2**	20% Potential Market: 701.6 thousand person trips **Score: 2**	27% Potential Market: 517.6 thousand person trips **Score: 2**	21% Potential Market: 854.5 thousand person trips **Score: 2**	**60%** **Potential Market (France, Germany & UK): 1.4 million person trips** **Score: 3**
Role as a Travel Motivator • *Data is from 1997 Conversion Study: % saying "live theatre events" were important to decision to visit most recent vacation destination*	24% **Score: 2**	20% **Score: 2**	27% **Score: 3**	21% **Score: 2**	**Estimated Score: 1**
Role as a Demand Supporter • *Comments are subjective*	Theatre of interest to part of the touring market for whom it is an important part of their travel experience; also provides evening entertainment for this market Of less importance in strengthening the appeal of NS for the meetings and incentive travel market Theatre is an important activity for the urban destination market Of limited interest to the vacation destination market, although can be important as evening entertainment				

PRODUCT: THEATRE

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Growth Potential	**Estimated Score:** 1 for all markets, based on growing interest in cultural/heritage tourism				
Multi-Season Potential - Shoulder • *Comments are subjective*	Reasonably good potential to contribute to generating shoulder season trips, particularly from the regional market for the Halifax urban product; to a lesser extent from the Ontario market which has a fairly high interest in theatre				
Multi-Season Potential - Nov to April • *Comments are subjective*	Some moderate potential to contribute to generating trips, particularly to Halifax (Neptune Theatre) in the November to May period, from the regional market and limited potential in the Ontario market				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Moderate USP overall; some quality theatre products in province but not well known and limited attendance from visitor markets; Atlantic Theatre Festival quality product although much of attendance from Halifax residents; variety of other product, some of it high quality/unique - Ships Company Theatre, Neptune, Mulgrave Road, Chester Playhouse, Shakespeare by the Sea; also a number of theatre festivals, e.g. Antigonish; Centre Bras d'Or and dinner theatre				
Latent Resource Quality/Potential • *Comments are subjective*	Considerable artistic/performing arts talent in the province; also good base of facilities and theatre companies to work with; potential to be stronger product for visitors; also shoulder/winter season potential for Neptune Theatre; also potential to host theatre/living history performances at unique venues such as Halifax Citadel, Fortress Louisbourg				
Constraints to Growth- *Subjective Comments*	No major constraints to further development				

REGIONAL SCORES

Theatre	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	2.1	2	2	3	2	1	2	3
Latent Resource Quality	3	3	3	4	3	1	3	4
Constraints to Growth	3	3	3	3	3	3	3	3
Percent of Perfect Score	53%	52%	52%	66%	52%	32%	52%	66%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:
Theatre

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	POINTS (Excl. Europe)
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	**Weight**	**Score**	**Points**	**Score**	**Points**	**Score**	**Points**	**Score**	**Points**	**Score**	**Points**	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	2	6	2	12	1	6	1	9	1	12	33
Visitor Satisfaction Levels	3	1	3	3	18	3	18	1	9		0	48
Potential Market Size	5	2	10	2	20	2	20	2	30	1	20	80
Role of the Product as a Travel Motivator	5	2	10	2	20	3	30	2	30	1	20	90
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	2	2.5	2	5	2	5	2	7.5	2	10	20
- Meetings and Incentive Travel Market	0.75	1	0.75	1	1.5	1	1.5	1	2.25	1	3	6
- Urban Destination Market	0.5	3	1.5	3	3	3	3	3	4.5	2	4	12
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential	4	1	4	1	8	1	8	1	12	1	16	32
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	3	15	2	20	1	10	1	15	0	0	60
November to April	5	2	10	1	10	0	0	0	0	0	0	20
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		33	**63.3**	33	**118.5**	33	**102.5**	33	**120.8**	30	**87.0**	**405**
Score as % of a Perfect Score			38%		36%		31%		24%		15%	31%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	2	30	2	30	2	45	2	60	128
Latent Resource Quality/Potential	6	3	18	3	36	3	36	3	54	3	72	144
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		19.5	**58.5**	19.5	**102.0**	19.5	**102.0**	19.5	**153.0**	19.5	**204.0**	**416**
Score as % of a Perfect Score			60%		52%		52%		52%		52%	53%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**122**	**52.5**	**221**	**52.5**	**205**	**52.5**	**274**	**49.5**	**291**	**821**
Score as % of a Perfect Score			46%		42%		39%		35%		29%	39%

NOTES:

1. Represents a ranking of importance of 2.4 out of 4 for 'live performing arts' for the European market.

REGIONAL COMMENTS

Cape Breton
Current USP limited - primary product is Bras D'Or Festival of the Arts.

Variety of latent resource potential for this product in Cape Breton - both dramatic and musical arts. No major constraints to development.

South Shore
Current USP limited- some product (Chester, Lunenburg) and summer theatre at White Point Beach Lodge.

Variety of latent resource potential for this product in the region. No major constraints to development

Annapolis Valley
Stronger USP than other regions - Atlantic Theatre Festival, Evangeline Play at Church Point; Mermaid Theatre Company in Windsor

Latent resource potential to strengthen current product for visitor markets and to build "living history" theatrical performances using historic sites as venues. No major constraints to development.

Eastern Shore
Weak USP at present; product limited to Mulgrave Road Theatre in Guysborough and some limited performances at Sherbrooke Village

Limited latent resource potential - small population; perhaps some potential to grow existing product for visitor markets. No major constraints to development other than small population.

Northumberland Shore
Existing USP based on Festival Antigonish theatre - quality theatre product but only for a limited time in the summer; also performances at deCoste Entertainment Centre in Pictou.

Moderate quality potential for further development, building on existing product. No major constraints to further development.

Fundy Shore
Existing USP based on Ships Company Theatre in Parrsboro - quality theatre, unique setting.

Moderate quality potential for further development, building on existing product. No major constraints to further development.

Halifax Urban Area

Moderately strong USP; existing product including Neptune Theatre (though only offers minimal product during summer tourist season), Shakespeare by the Sea and unique settings; Dalhousie Arts Centre and variety of other venues.

Wide range of resources available associated with universities, NASCAD, existing theatre companies, for development of new and expanded product; also some unique venues for performances such as Halifax Citadel, George's Island, Pier 21, etc.

No major constraints to further development.

THEATRE

MARKET READINESS ISSUES

- Good quality/quantity of theatre experiences available through province but not necessarily accessible or aggressively promoted to visitor markets

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Funding support
- Sufficient market support for summer theatre programs
- Reaching visitor markets through marketing and promotional efforts
- Enhanced awareness/understanding of theatre community re tourism issues and potential opportunities and vice versa

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Create a packaged, "theatre tour" product
- Co-operative marketing efforts, including packages, between tourism operators and theatres
- Theatre productions focussed on Nova Scotia's history, characters, such as a theatre production based on the life of Alexander Graham Bell

PRODUCT: GOLF					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels* • *Ont/Que data is for "other Canadians"*	4% participation rate; 26,600 persons **Score: 2**	7% participation rate; 23,600 persons **Score: 2**	7% participation rate; 5,400 persons **Score: 1**	5% participation rate 8,600 persons **Score: 1**	4% participation rate 1,400 persons **Score: 1**
Visitor Satisfaction Levels • *Data from NS Conversion Study; % saying "golf" is much better than elsewhere (Small sample sizes)*	17% **Score : 1**	17% **Score: 1**	45% **Score: 4**	New England: 50% Mid Atlantic: 25% **Score: 4**	N/A
Potential Market Size • *Data is from 1997 Conversion Study; % saying "golf" was important to decision to visit most recent vacation destination* • *European data from CTC Pleasure Travel Market Studies* • *Applied to total person trips from the market, to or within Canada (inter-prov'l)*	12% Potential Market: 195.9 thousand person trips **Score: 1**	8% Potential Market: 280.6 thousand person trips **Score: 1**	11% Potential Market: 210.9 thousand person trips **Score: 1**	5.2% Potential Market: 211.6 thousand person trips **Score: 1**	19% Potential Market (France, Germany & UK): 440 thousand person trips **Score: 2**
Role as a Travel Motivator • *Data is from 1997 Conversion Study; % saying "golf" was important to decision to visit most recent vacation destination*	12% **Score: 2**	8% **Score: 1**	11% **Score: 2**	5.2% **Score: 1**	19% **Score: 2**
Role as a Demand Supporter • *Comments are subjective*	Of importance to a part of the touring market in terms of strengthening the appeal of NS as a destination, moreso in the Canadian market where awareness is higher Golf an important contributing factor in destination choice for the meetings and incentive travel market Also a factor, but to a lesser extent, for the urban destination market Golf an important activity for much of the vacation destination market - even those who are not regularly golfers				
Growth Potential • *Canadian data from CPGA studies; US data from US Forest Service Study for change 1982 to 1994;*	Canadian participation rate increased from 18.4% (12 years and over) in 1990 to 19.4% in 1996, an increase in the number of participants of 23% (3.9 million to 4.8 million) Score: 3			Increase in number of participants of 29% **Score: 3**	Estimated **Score: 3** based on Nth. American experience

PRODUCT: GOLF

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Multi-Season Potential - Shoulder • *Comments are subjective*	Product has reasonably good potential to generate shoulder season travel, particularly in the fall and from the regional market				
Multi-Season Potential - Nov to April • *Comments are subjective*	No potential				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Nova Scotia USP for golf currently moderate but strengthening with recent new and upgraded courses, some high profile recognition (e.g. for Highland Links course) and top quality courses (e.g. Glen Arbour, Bell Bay) and substantially increased marketing efforts can be expected to increase USP in near future.				
Latent Resource Quality/Potential • *Comments are subjective*	Province has excellent natural resources for golf course development - scenic, ocean vistas; variety of landscapes; major challenge from resource perspective is weather conditions, particularly in the spring				
Constraints to Growth • *Comments are subjective*	No major constraints to growth.				

REGIONAL SCORES

Golf	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	2.6	5	2	2	1	0	2	3
Latent Resource Quality	4	4	4	3	2	2	3	3
Constraints to Growth	3	3	3	3	4	3	4	2
Percent of Perfect Score	63%	81%	58%	52%	45%	31%	58%	54%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY
PRODUCT:
Golf

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	**POINTS (Excl. Europe)**
Current Visitation to NS May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	2	6	2	12	1	6	1	9	1	12	33
Visitor Satisfaction Levels	3	1	3	1	6	4	24	4	36		0	69
Potential Market Size	5	1	5	1	10	1	10	1	15	2	40	40
Role of the Product as a Travel Motivator	5	2	10	1	10	2	20	1	15	2	40	55
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	2	2.5	2	5	2	5	1	3.75	1	5	16
- Meetings and Incentive Travel Market	0.75	3	2.25	4	6	4	6	4	9	2	6	23
- Urban Destination Market	0.5	2	1	1	1	1	1	1	1.5	1	2	5
- Vacation Destination Market	0.5	3	1.5	3	3	2	2	2	3	1	2	10
Growth Potential	4	3	12	3	24	3	24	3	36	3	48	96
Multi-Season Potential												
Shoulder Season (May/June, Sept/Oct)	5	3	15	2	20	2	20	2	30	1	20	85
November to April	5	0	0	0	0	0	0	0	0	0	0	0
Market Awareness- NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*33*	**58.3**	*33*	**97.0**	*33*	**118.0**	*33*	**158.3**	*30*	**175.0**	**432**
Score as % of a Perfect Score			35%		29%		36%		32%		29%	33%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	3	45	3	45	2	45	2	60	158
Latent Resource Quality/Potential	6	4	24	4	48	4	48	4	72	4	96	192
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		*19.5*	**64.5**	*19.5*	**129.0**	*19.5*	**129.0**	*19.5*	**171.0**	*19.5*	**228.0**	**494**
Score as % of a Perfect Score			66%		66%		66%		58%		58%	63%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**123**	**52.5**	**226**	**52.5**	**247**	**52.5**	**329**	**49.5**	**403**	**925**
Score as % of a Perfect Score			47%		43%		47%		42%		41%	44%

NOTES:

REGIONAL COMMENTS

Cape Breton
Strong USP due to national/international recognition of Highland Links Course and increasingly, Bell Bay. Also several other quality courses on the Island to create a golf cluster - Dundee, Cheticamp.

Marketing efforts of the "Fab Four" creating a strong USP

Excellent natural resources for golf course development - scenery, landscapes, variety of topography; good fall season No major constraints to further development.

South Shore
Golf USP not as nearly as strong as Cape Breton or Halifax; only a few courses; some unique, quality courses, e.g. Chester, but not on same level as Highland Links or Glen Arbour.

Excellent natural resources for golf course development - coastal lands, ocean vistas, long playing season but availability of land likely to be a challenge. No major constraints to further development.

Annapolis Valley
Golf USP not as nearly as strong as Cape Breton or Halifax; only a few courses. The Digby Pines is one of the better quality courses in the province and a major contributer golf USP in this region

Quality natural resources but not as outstanding as other regions - more likely to be inland; weather conditions generally better than coastal areas. No major constraints to further development.

Eastern Shore
Product extremely limited - only two courses in the entire region.

Natural resources of moderate quality - potential for good vistas, ocean land but tends to be rocky terrain and expensive to develop. No major constraints to further development.

Northumberland Shore
Golf USP not as strong as Cape Breton at present; product is limited though new product coming on stream in Pugwash area will enhance region's USP for golf.

Moderate quality natural resources for golf - variety of landscapes, ocean views from many areas.

No major constraints to further development.

Fundy Shore
Current product is very limited; small number of courses and not top quality.

Moderate quality natural resources for golf - variety of landscapes, ocean views in some areas; topography and rock likely to present a challenge in some parts of this region.

No major constraints to further development.

Halifax Urban Area
Moderate USP at present but likely to increase significantly as Glen Arbour course becomes known. Three or four good quality publically accessible courses in the region. There area a number of other good courses but several are private.

Moderate quality natural resources for golf in area surrounding the urban core but availability of land likely to be an increasing challenge and constraint to further development.

GOLF

MARKET READINESS ISSUES
- Need for many of existing courses to upgrade - irrigation, improved infrastructure, service quality, overall operations
- Need strengthening of customer service, training, and accommodating tourism markets through efforts such as accepting Tee-off reservations
- Need/opportunity for "flagship" courses in Halifax area -one already developed at Glen Arbour?

COSTS/CHALLENGES TO FURTHER DEVELOPMENT
- Economic viability/financing of development

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES
- With recent developments and ongoing projects, future development needs may not be extensive - focus should be on upgrading, service quality, training and promotion such as web site development, Golf Nova Scotia marketing initiatives
- More packaging of golf product with accommodations, etc.
- Need for better information on golf visitors - quality of their experience, visitor origins, etc.
- Training in customer service and, in particular, customer service for visitor markets
- Improved course maintenance - and maintenance levels that reflect the quality of the courses
- Major golf "events" such as Skins games, tournaments to increase national/international profile of province's golf courses

PRODUCT: LUNENBURG/ANNAPOLIS ROYAL HERITAGE COMMUNITIES					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1992 Exit Survey Traffic Flow Patterns on visitation to these communities applied to 1998 May-Oct visitor levels* • *Data is not available by origin so same percentage is applied to all markets - numbers should be viewed with caution*	14% participation rate; 93,100 persons **Score: 3**	14% participation rate; 47,200 persons **Score: 3**	14% participation rate; 10,800 persons **Score: 1**	14% participation rate 24,100 persons **Score: 2**	14% participation rate 4,900 persons **Score: 1**
Visitor Satisfaction Levels • *No data*	N/A	N/A	N/A	N/A	N/A
Potential Market Size • *Score estimated based on historic sites and cultural/heritage tourism data*	**Estimated Score: 2**	**Estimated Score: 3**	**Estimated Score: 3**	**Estimated Score: 2**	**Estimated Score: 1**
Role as a Travel Motivator • *Score estimated based on cultural/heritage tourism data*	**Estimated Score: 3**	**Estimated Score: 3**	**Estimated Score: 3**	**Estimated Score: 2**	**Estimated Score: 2**
Role as a Demand Supporter • *Comments are subjective*	Seen to be very important factor in strengthening the appeal of Nova Scotia for the touring market, particularly Lunenburg with is UNESCO designation Of some interest to the meetings and incentive travel market in motivating destination selection Of limited interest for part of the urban destination market Potentially an important factor/activity for the vacation destination market - the types of experiences potentially available could become contributing factor to destination selection				
Growth Potential • *Score estimated based on historic sites*	**Estimated score for all markets: 2**				
Multi-Season Potential - Shoulder • *Comments are subjective*	Product has reasonably strong appeal and potential to generate shoulder season travel; a good fit with the interests of shoulder season travellers from all markets				
Multi-Season Potential - Nov to April • *Comments are subjective*	Some limited potential to generate travel in November to April period, but will require concerted effort to make sure the communities are "open for business" at this time of year				

PRODUCT: LUNENBURG/ANNAPOLIS ROYAL HERITAGE COMMUNITIES					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Lunenburg's UNESCO World Heritage Designation gives Nova Scotia a strong USP in this product area, although it is probably not yet well-recognized in the marketplace; Generally, however, NS known for unique heritage/historic communities.				
Latent Resource Quality/Potential • *Comments are subjective*	Lunenburg enjoys high quality, unique resources - heritage architecture, people and traditional lifestyles, variety of services and attractions, festivals, scenery in surrounding coastal areas, with strong potential to play a much more significant role as a tourism destination for more than the traditional summer months; Annapolis Royal also a heritage community with several established attractions, variety of shopping, unique accommodations, etc. with appeal to visitor markets.				
Constraints to Growth • *Comments are subjective*	Challenges of mobilizing the community to handle tourism growth, and to maximize potential opportunities without harming the fabric of the community; conflicts between traditional residents/way of life and newcomers				

REGIONAL SCORES

Lunenburg/Annapolis Royal Heritage Communities	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	3.6		4	3				
Latent Resource Quality	3.9		4	4				
Constraints to Growth	2		2	3				
Percent of Perfect Score	64%		68%	66%				

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:
Lunenburg/Annapolis Royal Heritage Communities

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL POINTS (Excl. Europe)
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	
Current Visitation to NS: May to Oct. 1998		684,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size (1)	3	3	9	1	6	3	18	2	18	1	12	51
Visitor Satisfaction Levels NO DATA	3		0		0		0		0		0	0
Potential Market Size (based on historic sites)	5	2	10	3	30	3	30	2	30	1	20	100
Role of the Product as a Travel Motivator (based on historic sites)	5	3	15	3	30	3	30	2	30	2	40	105
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	4	5	5	12.5	5	12.5	5	18.75	5	25	49
- Meetings and Incentive Travel Market	0.75	2	1.5	2	3	2	3	2	4.5	2	6	12
- Urban Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
- Vacation Destination Market	0.5	3	1.5	2	2	2	2	2	3	2	4	9
Growth Potential - (historic sites)	4	2	8	2	16	2	16	2	24	2	32	64
Multi-Season Potential												
Shoulder Season (May/June, Sept/Oct)	5	3	15	3	30	3	30	3	45	3	60	120
November to April	5	1	5	1	10	1	10	1	15	1	20	40
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		30	70.5	30	140.5	30	152.5	30	189.8	30	221.0	553
Score as % of a Perfect Score			47%		47%		51%		42%		37%	46%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	4	30	4	60	4	60	3	67.5	3	90	218
Latent Resource Quality/Potential	6	3	18	4	48	4	48	4	72	3	72	186
Product Potential - Constraints/Capacity for Growth	6	2	12	2	24	2	24	2	36	2	48	96
Sub total: Product Related Criteria		19.5	60.0	19.5	132.0	19.5	132.0	19.5	175.5	19.5	210.0	500
Score as % of a Perfect Score			62%		68%		68%		60%		54%	64%
TOTAL: MARKET AND PRODUCT CRITERIA		49.5	131	49.5	273	49.5	285	49.5	365	49.5	431	1053
Score as % of a Perfect Score			53%		55%		57%		49%		44%	53%

NOTES:

1 Existing market size score is based on estimates of persons visiting these communities for 30 minutes or more or overnight based on the 1992 Visitor Traffic Flows Report (% of person-visits applied to 1998 visitor counts)

REGIONAL COMMENTS

South Shore

Strong USP due to heritage and UNESCO World Heritage designation but potential to increase profile; main constraint to further development is dealing with challenges of tourism growth and community needs/wishes.

Annapolis Valley

USP for Annapolis Royal not as strong but resource potential is high; constraints to further development seen to be less than in Lunenburg.

UNIQUE DESTINATIONS/COMMUNITIES

(Major - Lunenburg/Annapolis Royal, and Other; see comments under Marine Heritage as well)

MARKET READINESS ISSUES

- Province has a number of unique destinations/communities with of varying quality - Lunenburg with UNESCO World Heritage Designation is a major element of this product
- Some communities are beginning to suffer from overcrowding - insufficient accommodation, food service, etc. to support crowds

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Identify what makes a "tourism destination community" and identify successful models/practices (effort to do this currently underway through Tourism Atlantic)
- Handling potential conflicts between local residents and their desires for the community and needs/demands of visitors; managing/controlling demand and capacity to ensure that the experiences are not destroyed

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Establish a "how to model" and workshops to educate communities with potential, with some focus on how to bring in/work with partners and community members
- Shipbuilding as demonstration projects to appeal to visitors
- Develop learning vacations and/or education programs based on marine, heritage and other unique features of the community - e.g. in Lunenburg, develop the Lunenburg World Heritage Institute
- Establish an architectural/town planning/garden interpretative program including tours, archaeological investigations and demonstrations, restorations
- Live re-enactments/interpretation of events important to the history/heritage of the community
- Artist's Village - studios and galleries accompanied by accommodations; studios open for viewing and instruction
- Harbour/waterfront improvements
- Expand range/scale of marine based opportunities - scuba, yacht chartering, sea kayaking, whale watching, coastal hiking and cycling, sightseeing cruises

PRODUCT: OTHER UNIQUE/HERITAGE COMMUNITIES (e.g. Baddeck, Shelburne, Mahone Bay, Wolfville, etc.)

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1992 Exit Survey Traffic Flow Patterns on visitation to these communities applied to 1998 May-Oct visitor levels* • *Data is not available by origin so same percentage is applied to all markets - numbers should be viewed with caution*	23% participation rate; 152,900 persons **Score: 4**	23% participation rate; 77,600 persons **Score: 3**	23% participation rate; 17,700 persons **Score: 1**	23% participation rate 39,600 persons **Score: 2**	23% participation rate 8,000 persons **Score: 1**
Visitor Satisfaction Levels • *No data available*	N/A	N/A	N/A	N/A	N/A
Potential Market Size • *Data is based on historic sites, and cultural/heritage tourism data*	**Estimated Score: 2**	**Estimated Score: 3**	**Estimated Score: 3**	**Estimated Score: 2**	**Estimated Score: 1**
Role as a Travel Motivator • *Data is based on historic sites, and cultural/heritage tourism data*	**Estimated Score: 3**	**Estimated Score: 3**	**Estimated Score: 3**	**Estimated Score: 2**	**Estimated Score: 2**
Role as a Demand Supporter • *Comments are subjective*	Strong role for touring market -unique, heritage communities with shopping, dining, accommodations, attractions are very appealing to this market. Limited role for meetings and incentive travel market (some communities are destinations for meetings, otherwise a location for side/pre/post trips). Limited role for urban destination market - these communities generally do not have sufficient scope/range of appeals to make them a destination for this market segment. Moderate role for vacation destination market - similar to touring market				
Growth Potential – *Based on historic sites - no data on heritage communities*	Data from Canadian Travel Survey suggests declining visits to historic sites but general market trends suggest increasing interest in these types of experiences. **Estimated score: 2** for all markets.				
Multi-Season Potential - Shoulder • *Comments are subjective*	Good potential to contribute to attracting visitors in the shoulder season - unique/heritage communities are an important part of NS product mix, not weather dependent; however, communities must make an effort to be "open" for visitors during this season.				

PRODUCT: OTHER UNIQUE/HERITAGE COMMUNITIES (e.g. Baddeck, Shelburne, Mahone Bay, Wolfville, etc.)					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
Multi-Season Potential - Nov to April • *Comments are subjective*	Some limited potential to contribute to attracting visitors in the off-season - potential for pre-Christmas shoppin and special events; communities within day trip distance of Halifax likely have strongest potential; however, communities must make an effort to be "open" for visitors during this season.				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Nova Scotia known for having a number of unique/heritage communities, also fishing villages, reflecting a different culture and way of life, with appeals such as heritage architecture, crafts, shopping, dining, attractions. USP weaker in the US and European market which have ready access to a wide range of unique/heritage communities.				
Latent Resource Quality/Potential • *Comments are subjective*	Resource quality seen to be moderate; some communities have maintained a stronger heritage through protectio of facades, architecture, streetscapes, etc. and have more to offer potential visitors than others.				
Constraints to Growth • *Comments are subjective*	No major constraints to growth				

REGIONAL SCORES

Other Unique/ Heritage Communities	**Average Prov'l Score**	**Cape Breton**	**South Shore**	**Annapolis Valley**	**Fundy Shore**	**Eastern Shore**	**Northumb. Shore**	**Halifax Urban**
		Score	Score	Score	Score	Score	Score	Score
Current USP	2.6	3	5	3	0	0	2	
Latent Resource Quality	2.9	3	3	3	2	1	3	
Constraints to Growth	3	3	3	3	2	2	3	
Percent of Perfect Score	56%	60%	75%	60%	25%	19%	52%	

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:

Other Unique/Heritage Communities

(Includes Baddeck, Mahone Bay, Shelburne, Wolfville, Pictou)

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		POINTS (Excl. Europe)
Market Weight			1		2		2		3		4	
Current Visitation to NS: May to Oct 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size (1)	3	4	12	1	6	3	18	2	18	1	12	54
Visitor Satisfaction Levels NO DATA	3		0		0		0		0		0	0
Potential Market Size (based on historic sites)	5	2	10	3	30	3	30	2	30	1	20	100
Role of the Product as a Travel Motivator (based on historic sites	5	3	15	3	30	3	30	2	30	2	40	105
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	3	3.75	4	10	4	10	4	15	4	20	39
- Meetings and Incentive Travel Market	0.75	1	0.75	1	1.5	1	1.5	1	2.25	1	3	6
- Urban Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
- Vacation Destination Market	0.5	2	1	2	2	2	2	2	3	1	2	8
Growth Potential - (based on historic sites)	4	2	8	2	16	2	16	2	24	2	32	64
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	3	15	3	30	3	30	3	45	3	60	120
November to April	5	1	5	1	10	1	10	1	15	1	20	40
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*30*	**71.0**	*30*	**136.5**	*30*	**148.5**	*30*	**183.8**	*30*	**211.0**	**540**
Score as % of a Perfect Score			47%		46%		50%		41%		35%	45%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	3	45	3	45	2	45	2	60	158
Latent Resource Quality/Potential	6	2	12	3	36	3	36	3	54	3	72	138
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		*19.5*	**52.5**	*19.5*	**117.0**	*19.5*	**117.0**	*19.5*	**153.0**	*19.5*	**204.0**	**440**
Score as % of a Perfect Score			54%		60%		60%		52%		52%	56%
TOTAL: MARKET AND PRODUCT CRITERIA		**49.5**	**124**	**49.5**	**254**	**49.5**	**266**	**49.5**	**337**	**49.5**	**415**	**979**
Score as % of a Perfect Score			50%		51%		54%		45%		42%	49%

NOTES:

1 Existing market size score is based on estimates of persons visiting these communities for 30 minutes or more or overnight based on the 1992 Visitor Traffic Flows Report (% of person-visits applied to 1998 visitor counts)

REGIONAL COMMENTS

Cape Breton
Baddeck and Cheticamp fall into this category; offer different, but unique experiences - Bras d'Or Lakes, Alexander Graham Bell influence in Baddeck and Acadian coastal community in Cheticamp. USP and latent resource potential moderate.

No major constraints to further development.

South Shore
A number of communities that fall into this category including Peggy's Cove, Mahone Bay, Chester, and Shelburne. Strong USP due to number and variety of communities and range of experiences and services offered.

Moderate quality latent resource potential.

No major constraints to further development.

Annapolis Valley
Communities include Wolfville and Digby. Moderate USP - some heritage areas, attractions such as Atlantic Theatre Festival and unique accommodations (The Pines, heritage inns in Wolfville); USP and latent resource potential moderate.

No major constraints to further development.

Eastern Shore
No existing USP in this product area; some limited resource potential (Sherbrooke, Guysborough) but some significant constraints to further development due to scale of communities, distance from markets, etc.

Northumberland Shore
Limited USP - Pictou is the only community that "fits" in this category; Moderate USP and latent resource potential.

No major constraints to further development.

Fundy Shore
No existing USP in this product area; some limited resource potential (Parrsboro) but some significant constraints to further development due to scale of communities, distance from markets, etc.

Halifax Urban Area N/A

See comments on Market Readiness, Costs/Challenges to Further Development and Product Development Opportunities with Major Unique/Heritage Communities.

PRODUCT: FESTIVALS AND EVENTS (Excludes one-time, mega events)

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels* • *Ont/Que data is for "other Canadians"*	11% participation rate; 73,100 persons **Score: 3**	15% participation rate; 50,600 persons **Score: 3**	15% participation rate; 11,500 persons **Score: 1**	16% participation rate 27,600 persons **Score: 2**	13% participation rate 4,500 persons Score: 1
Visitor Satisfaction Levels • *No data*	N/A	N/A	N/A	N/A	N/A
Potential Market Size • *Data from various sources; generally not the same question/information as for other products* • *Applied to total person trips from the market, to or within Canada (inter-prov'l)* –*European data based on CTC Pleasure Travel Market Studies;*	44.7% Potential Market: 729.9 thousand person trips **Score: 2**	45.6% Potential Market: 1.6 million person trips **Score: 3**	27.8% Potential Market: 532.9 thousand person trips **Score: 2**	57% Potential Market: 2.3 million person trips **Score: 4**	64% Potential Market (France, Germany & UK): 1.5 million person trips **Score: 3**
Role as a Travel Motivator • *Data is from various sources; Atlantic Canada and Ontario scores are estimates due to lack of data*	**Estimated Score: 3**	**Estimated Score: 4**	36% **Score: 3**	57% **Score: 4**	64% **Score: 4**
Role as a Demand Supporter • *Comments are subjective*	An important product for the touring market and can play a significant role in generating demand to the provinc (major events) and to different areas within the province. Some minimal role in generating demand from meetings and convention market, particularly from the region - unique/major festivals enhance the appeal of the destination. Moderate role in supporting demand from the urban destination market - major festivals and events can play a role in motivating destination selection; some particular potential in the off-season from the regional market Also a moderate role in supporting demand from the vacation destination market.				
Growth Potential • *Data from CTS on participation in festivals/events by Canadians*	Statistics indicate a decline in participation from 4.1% in 1994 to 3.1% in 1996, by Canadians travelling in Canada. No US data. **Estimated Score: 0** applied to all markets.				

PRODUCT: FESTIVALS AND EVENTS (Excludes one-time, mega events)

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Multi-Season Potential - Shoulder *• Comments are subjective*	Good potential for major/unique festivals and events to generate/contribute to generating trips from the regional market, and to a lesser extent from the Ontario, Quebec and New England markets; depends on the scale, theme and scope of the festival, packaging, promotion, etc.				
Multi-Season Potential - Nov to April *• Comments are subjective*	Some limited potential to generate trips from the regional market and, to a very limited extent, from the Ontario Quebec and New England markets.				
PRODUCT CRITERIA					
Current Unique Selling Proposition *• Comments are subjective*	Nova Scotia has a number of festivals/events that are well-known in prime markets (Atlantic region, Ontario), such as Tattoo, Celtic Colours, Jazz Festival, Buskers, Mahone Bay Wooden Boat, Antigonish Highland Games However, only a few are "major", many are significant but not quite of the scale/scope to give strong USP in further away markets.				
Latent Resource Quality/Potential *• Comments are subjective*	Province has excellent resources for further development of major festivals/events. A large number of existing festivals/events with strong base of support on which to build, plus numerous other themes that could form the basis for festivals/events; potential to develop shoulder and November to April product.				
Constraints to Growth *• Comments are subjective*	No major constraints to further development but challenge of mobilizing volunteers and festival organizers to "grow" their festivals for visitor markets.				

REGIONAL SCORES

Festivals and Events	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	1.5	3	3	2	1	1	2	3
Latent Resource Quality	4	4	4	3	2	1	3	4
Constraints to Growth	3	3	3	3	2	2	3	3
Percent of Perfect Score	55%	66%	66%	52%	32%	26%	52%	66%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:
Festivals and Events (excluding one-time mega events)

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL POINTS (Excl. Europe)
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	3	9	3	18	1	6	2	18	1	12	51
Visitor Satisfaction Levels - NO DATA	3		0		0		0		0		0	0
Potential Market Size (1)	5	2	10	3	30	2	20	4	60	3	60	120
Role of the Product as a Travel Motivator (2)	5	3	15	4	40	3	30	4	60	4	80	145
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	3	3.75	3	7.5	3	7.5	2	7.5	2	10	26
- Meetings and Incentive Travel Market	0.75	2	1.5	1	1.5	1	1.5	1	2.25	1	3	7
- Urban Destination Market	0.5	2	1	2	2	2	2	2	3	2	4	8
- Vacation Destination Market	0.5	2	1	2	2	2	2	1	1.5	1	2	7
Growth Potential	4	0	0	0	0	0	0		0		0	0
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	4	20	2	20	2	20	2	30	1	20	90
November to April	5	2	10	1	10	1	10	1	15	0	0	45
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*30*	**71.3**	*30*	**131.0**	*30*	**99.0**	*26*	**197.3**	*26*	**191.0**	**499**
Score as % of a Perfect Score			**48%**		**44%**		**33%**		**51%**		**37%**	**44%**
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	2	30	1	15	1	22.5	1	30	90
Latent Resource Quality/Potential	6	4	24	4	48	4	48	4	72	4	96	192
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		*19.5*	**64.5**	*19.5*	**114.0**	*19.5*	**99.0**	*19.5*	**148.5**	*19.5*	**198.0**	**426**
Score as % of a Perfect Score			**66%**		**58%**		**51%**		**51%**		**51%**	**55%**
TOTAL: MARKET AND PRODUCT CRITERIA		**49.5**	**136**	**49.5**	**245**	**49.5**	**198**	**45.5**	**346**	**45.5**	**389**	**925**
Score as % of a Perfect Score			**55%**		**49%**		**40%**		**51%**		**43%**	**48%**

NOTES:

1. Potential size refers to data from the Client Information Needs Study for Canadian Heritage, Atlantic Region, Final Report, reported attendance at a local festival during most recent vacation, US data refers to Boston vacationers reporting that festivals/events played an important role in determining the vacation destination.

2. Role of product as a travel motivator for Quebec represents data from the NS Quebec Awareness and Attitude Study, 1998 Anglophone and Francophone Results, the US data reflects Boston vacationers rating festivals as critically important or important to their vacation destination decision. Data not available for Ontario and Atlantic Canada.

REGIONAL COMMENTS

Cape Breton
Moderate USP - a number of well-established events, many of them music related, and increasing recognition of Celtic Colours.

High latent resource quality/potential for further development of product - culture (Acadián, Celtic), music, natural heritage, etc.

No major constraints to further development.

South Shore
Moderate USP - no "blockbuster" festivals/events but a good range and variety of events - Wooden Boat Festival, Lunenburg Folk Festival and Crafts Festival, also some in shoulder season.

High latent resource quality/potential for further development, particularly with a number of festivals that could be strengthened re their appeal to visitor markets; also a variety of themes that could form basis for festival development.

No major constraints to further development.

Annapolis Valley
One major event with recognition - Apple Blossom Festival; a number of smaller events but not as well known as in other regions.

Good quality resource potential for further development - some existing festivals that could be strengthened, potential for new ones.

No major constraints to further development.

Eastern Shore
Limited USP - only two notable events (Clam Harbour Sandcastle, Stan Rogers Festival -see music)

Resource potential limited - small local population and distance from markets makes festival/event development is a constraint to further development.

Northumberland Shore
Moderate USP - existing festival (Antigonish Highland Games) with high market recognition and a variety of other product.

Moderate resource quality/potential for further development

No major constraints to development.

Fundy Shore
Limited USP - no major festival/event with strong market recognition.

Limited resource quality/potential for further development - small population in much of the area, distance from markets are a constraint to further development.

Halifax Urban Area
A number of existing festivals/events (Tattoo, Jazz, Buskers, Film) give a moderate USP, but a lot more potential for further development given size of local market, wide variety of themes to build on.

Latent resource potential is good, and potential for shoulder and off-season product to contribute to generating visitors, particularly from regional market.

No major constraints to development.

FESTIVALS AND EVENTS

Note: This product category doe not include major one-time events such as the Tall Ships.

MARKET READINESS ISSUES

- Need for more professional development of festival and event organizers and volunteers - understanding not only of festivals and events but also how to work with the tourism sector
- Many festivals/events are not tourism-oriented - are not planned far enough in advance, cannot provide information on a timely basis, do not cater to visitors in their program delivery

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Mobilizing communities and volunteers to develop new, major festivals and/or expand/enhance existing festivals to appeal to visitor markets
- Funding, especially in initial years
- Positioning festivals and events as tourism products

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- New, "purpose built" festivals in spring and fall to act as demand generators for shoulder season
- One or two major, off-season events in Halifax area - music/entertainment theme or multi-cultural theme
- Develop additional unique festivals in November to April period - off-season theatre festivals, music festivals, craft fairs
- Enhanced, more professional delivery of festival products in NS - better programming, improved planning and development - and more consideration of programs and activities that appeal to visitors markets
- Providing enhanced "visitor" services - for example information, reserved seating/tickets for motorcoach groups, etc.
- Make March or April a "festival month" and establish a significant festival/event each weekend to form the basis for packages and a marketing campaign - suggested themes - lobster, maple syrup, music, multi-cultural
- Major festivals/events associated with upcoming anniversaries within the Acadian community
- Packaging of festivals and events with accommodations, other attractions, etc.
- Professional development of festival and event organizers, such as study tours; conferences; workshops; training sessions on understanding the tourism sector, how to package, how to work with the travel trade
- Festivals and events associated with the Acadian World Congres 2004, 2003 - 205 400th Anniversary of Champlain's explorations and settlements.

PRODUCT: LOCAL SIGHTSEEING TOURS

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Opportunities for local sightseeing tours (bus, taxi, boat, walking) in Nova Scotia are limited, particularly outside of Halifax;				
Latent Resource Quality/Potential • *Comments are subjective*	Excellent latent resource potential for local sightseeing tours throughout the province - could be based around natural heritage, cultural heritage, general sightseeing, unique sites/stories, also local walking/hiking tours, opportunities for both guided and self-guided tours.				
Constraints to Growth • *Comments are subjective*	No constraints to further development although regulatory environment a challenge				

REGIONAL SCORES

Local Sightseeing Cruises and Tours	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	2	2	2	1	1	0	1	3
Latent Resource Quality	4	4	4	4	3	2	2	4
Constraints to Growth	4	3	4	4	4	4	4	3
Percent of Perfect Score	65%	58%	65%	57%	51%	37%	45%	66%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:

Local Sightseeing Cruises and Tours

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	**POINTS**
Current Visitation to NS: May to Oct 1998		664,813		337,549		77,002		172,231		34,786		**(Excl.**
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		**Europe)**
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	1	3	2	12	1	6	2	18	1	12	39
Visitor Satisfaction Levels	3	1	3	1	6	1	6	2	18	2	24	33
Potential Market Size - NO DATA	5		0		0		0		0	3	60	0
Role of the Product as a Travel Motivator- NO DATA	5		0		0		0		0	4	80	0
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	2	2.5	3	7.5	3	7.5	3	11.25	3	15	29
- Meetings and Incentive Travel Market	0.75	1	0.75	2	3	2	3	2	4.5	2	6	11
- Urban Destination Market	0.5	2	1	3	3	3	3	3	4.5	3	6	12
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential - NO DATA	4		0		0		0		0		0	0
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	2	10	2	20	2	20	2	30	2	40	80
November to April	5	1	5	1	10	1	10	1	15	1	20	40
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*19*	**25.8**	*19*	**62.5**	*19*	**56.5**	*19*	**102.8**	*29*	**265.0**	**248**
Score as % of a Perfect Score			**27%**		**33%**		**30%**		**36%**		**46%**	**33%**
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	2	15	2	30	2	30	2	45	2	60	120
Latent Resource Quality/Potential	6	4	24	4	48	4	48	4	72	4	96	192
Product Potential - Constraints/Capacity for Growth	6	4	24	4	48	4	48	4	72	4	96	192
Sub total: Product Related Criteria		*19.5*	**63.0**	*19.5*	**126.0**	*19.5*	**126.0**	*19.5*	**189.0**	*19.5*	**252.0**	**504**
Score as % of a Perfect Score			65%		65%		65%		65%		65%	65%
TOTAL: MARKET AND PRODUCT CRITERIA		**38.5**	**89**	**38.5**	**189**	**38.5**	**183**	**38.5**	**292**	**48.5**	**517**	**752**
Score as % of a Perfect Score			46%		49%		47%		51%		53%	49%

NOTES:

REGIONAL COMMENTS

Cape Breton
Limited USP; some sightseeing boat tours on Bras D'Or Lakes, and guided walks.

Excellent quality latent resource potential for further development

No major constraints to growth.

South Shore
Limited USP; some local sightseeing tours, guided walking tours in communities.

Excellent quality latent resource potential for further development, both natural and cultural/heritage.

No major constraints to growth

Annapolis Valley
USP very limited - very little product of this type in the region.

Excellent quality latent resource potential for further development, both natural and cultural/heritage.

No constraints to growth.

Eastern Shore

No product of this type in the region - no USP

Limited latent resource potential for further development

No constraints to growth.

Northumberland Shore
Weak USP; very little product of this type in the region.

Some latent resource potential based on natural/cultural/heritage resources of the area.

No constraints to further development.

Fundy Shore
Weak USP; very little product of this type in the region.

Moderate quality resource potential primarily associated with unique natural features of the area - Fundy tides, fossils, tidal flats, tidal bore, etc.

No constraints to further development.

Halifax Urban Area
Moderate USP; some product available (boat tours, city tours, some walking tours) but not as much as might be expected for a major city.

Significant latent resource potential - heritage/cultural themes that could form the basis for local sightseeing tours, harbour tours with drop-offs at different sites, etc.

No constraints to further development.

LOCAL SIGHTSEEING CRUISES AND TOURS

MARKET READINESS ISSUES

- Inconsistent quality of boats, interpretation and support facilities
- Limited product in many areas of the province although substantial resources available to form the basis for product
- Hard for visitors to access/find - no signage, often done on a part-time basis and operators hard to reach, no offices, etc.

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Economic viability
- Financing
- Regulations - Public Utilities Board for coach/mini-coach tours, Canadian Coastguard for boat tours

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Improvement in product quality - more training in delivering unique NS experiences including interpretation of nature, history, culture; enhanced customer service

PRODUCT: CABOT TRAIL

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels* • *Ont/Que data is for "other Canadians"*	4% participation rate; 26,600 persons **Score: 2**	43% participation rate; 145,100 persons **Score: 4**	43% participation rate; 33,100 persons **Score: 2**	26% participation rate 44,800 persons **Score: 2**	30% participation rate 10,400 persons **Score: 1**
Visitor Satisfaction Levels - *No data*	N/A	N/A	N/A	N/A	N/A
Potential Market Size • *Scores estimated using data on general sightseeing and touring*	**Estimated Score: 2**	**Estimated Score: 3**	**Estimated Score: 3**	**Estimated Score: 3**	**Estimated Score: 2**
Role as a Travel Motivator • *Scores estimated based on general sightseeing and touring*	**Estimated Score: 2**	**Estimated Score: 4**	**Estimated Score: 3**	**Estimated Score: 2**	**Estimated Score: 2**
Role as a Demand Supporter • *Comments are subjective*	Excellent demand supporter for the touring market; in fact, probably acts as a demand generator for many segments of the touring market; particularly strong outside of the Atlantic region. Some limited role as demand supporter for meetings and convention market - appeal for pre/post activities, and for segments using facilities in Cape Breton No role for urban destination market. Some limited role as a demand supporter for the vacation destination market, particularly that segment that selects Cape Breton as destination.				
Growth Potential • *Data from US Forest Service Study; Increase in number of participants 1982-1994*	**Estimated Score for all Markets: 2** based on growth in participation in general sightseeing.				
Multi-Season Potential - Shoulder • *Comments are subjective*	Excellent potential to contribute to/generate demand in the shoulder season, particularly the fall due to fall colours				
Multi-Season Potential - Nov to April • *Comments are subjective*	No potential in this season - weather, road conditions, most services closed				

<table>
<tr><th colspan="6">PRODUCT: CABOT TRAIL</th></tr>
<tr><th>CRITERIA</th><th>ATLANTIC CANADA</th><th>ONTARIO</th><th>QUEBEC</th><th>NEW ENGLAND MID-ATLANTIC</th><th>EUROPE</th></tr>
<tr><td>PRODUCT CRITERIA</td><td colspan="5"></td></tr>
<tr><td>Current Unique Selling Proposition
<i>• Comments are subjective</i></td><td colspan="5">Strong USP, particularly in other Canadian markets; Cabot Trail is a major icon for Nova Scotia and has high degree of recognition, though somewhat less so in US and European markets.</td></tr>
<tr><td>Latent Resource Quality/Potential
<i>• Comments are subjective</i></td><td colspan="5">Excellent quality natural resource but already well-established/developed so latent potential for further development not as high as might be expected.</td></tr>
<tr><td>Constraints to Growth
<i>• Comments are subjective</i></td><td colspan="5">No constraints to further development.</td></tr>
</table>

REGIONAL SCORES

Cabot Trail	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	3.5	4						
Latent Resource Quality	3	4						
Constraints to Growth	4	4						
Percent of Perfect Score	70%	80%						

REGIONAL COMMENTS Not Applicable; Comments above only relevant to one region.

MARKET READINESS ISSUES
- No major issues - product is generally market-ready
- Some quality concerns - road conditions, maintenance of pull offs and scenic views

COSTS/CHALLENGES TO FURTHER DEVELOPMENT
- None identified

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES
- Enhanced road maintenance
- Enhance existing scenic look offs (e.g. tree pruning to ensure views) and new look offs

PRODUCT: INDEPENDENT TOURING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from 1996 Exit Survey, 1998 May-Oct visitor levels, for "sightseeing"* • *Ont/Que data is for "other Canadians"*	50% participation rate; 332,400 persons **Score: 5**	74% participation rate; 249,800 persons **Score: 5**	74% participation rate; 56,900 persons **Score: 3**	82% participation rate 141,200 persons **Score: 4**	75% participation rate 26,100 persons **Score: 2**
Visitor Satisfaction Levels • *Data from NS Conversion Study; % saying "sightseeing" is much better than elsewhere*	29% **Score : 2**	25% **Score: 2**	15% **Score: 1**	New England: 25% Mid Atlantic: 36% **Score: 2**	N/A
Potential Market Size • *Data is from 1997 Conversion Study; % saying "sightseeing" was important to decision to visit most recent vacation destination* • *Applied to total person trips from the market, to or within Canada)* • *European score data from CTC Pleasure Markets Studies for UK & Germany*	16% Potential Market: 261.3 thousand person trips **Score: 1**	19% Potential Market: 666.5 thousand person trips **Score: 2**	33% Potential Market: 632.6 thousand person trips **Score: 2**	20% Potential Market: 813.8 thousand person trips **Score: 2**	69% Potential Market (France, Germany & UK): 1.6 million person trips **Score: 3**
Role as a Travel Motivator • *Data is from 1997 Conversion Study; % saying "sightseeing" was important to decision to visit most recent vacation destination*	16% **Score: 2**	19% **Score: 2**	33% **Score: 3**	20% **Score: 2**	69% **Score: 4**
Role as a Demand Supporter • *Comments are subjective*	Demand generator for touring market, therefore scores 5 Some potential as demand supporter for meetings and convention markets from outside the region, due to appea of destination for touring trips for pre/post activity Some potential as demand supporter for urban destination market also - often includes some limited touring as well as urban experience; Likewise for vacation destination market.				
Growth Potential *– No data*	N/A				

PRODUCT: INDEPENDENT TOURING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Multi-Season Potential - Shoulder • *Comments are subjective*	Excellent potential to contribute to generating demand during the shoulder season, particularly the fall - overall strength of province as a touring destination, fall colours, etc.				
Multi-Season Potential - Nov to April • *Comments are subjective*	Some limited potential in the November to April period from Canadian and European markets; destination still has appeal for touring, even in inclement weather. General touring not as weather sensitive as some activities but constrained by availability of open facilities/services.				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Generally strong USP as a touring destination, particularly outside Atlantic Canada				
Latent Resource Quality/Potential • *Comments are subjective*	Excellent quality natural resources and latent potential for touring throughout the province - scenery, cultural heritage, coastal areas, inland landscapes, fishing villages, etc. etc.				
Constraints to Growth • *Comments are subjective*	No constraints to further development.				

NB: **This product is not included in the scoring summary because it incorporates, to varying degrees, almost all of the products on the list. Summary of data is included for information only. No regional scoring completed.**

PRODUCT: DOWNHILL SKIING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Estimate of out-of-province visitors to key ski areas from NS November to May Study*	16,500 person visits **Score: 1**	Estimated at under 1,000 **Score: 0**	Estimated at under 1,000 **Score: 0**	Estimated at under 1,000 **Score: 0**	Estimated at under 1,000 **Score: 0**
Visitor Satisfaction Levels • *No data*	N/A	N/A	N/A	N/A	N/A
Potential Market Size • *Based on data from consumer research done for NS November to May Study; potential interest in visiting NS for winter trip including skiing* • *European market from CTC Pleasure Travel Market Studies*	9.1% Potential Market: 25.7 thousand person trips **Score: 1**	7.2% Potential Market: 43.1 thousand person trips **Score: 1**	7.2% Potential Market: 27.6 thousand person trips **Score: 1**	6.9% Potential Market: 41.9 thousand person trips **Score: 1**	75.4% Potential Market: 25 thousand person trips **Score: 1**
Role as a Travel Motivator • *Based on data from NS November to May Study consumer research*	9.1% **Score:1**	7.2% **Score: 1**	7.2% **Score: 1**	6.9% **Score: 1**	N/A
Role as a Demand Supporter • *Comments are subjective*	Not a contributing factor in destination selection for the touring market, the meetings and incentive travel market or the urban destination market. Some limited contribution for the winter vacation destination market from Atlantic Canada, and very limited contribution from Ontario, Quebec and New England/Mid-Atlantic				
Growth Potential • *Canadian data from Canada Ski Council statistics; US Data from US Forest Service Study - increase in number of participants 1982-1994*	Participation by Canadians decreased 9% between 1997 and 1998; demographics suggest continued decline in participation rates **Score: 0**			No. of participants increased by 58% (US Forest Service) Other sources suggest decline. **Score : 2**	**Estimated Score: 0**
Multi-Season Potential - Shoulder • *Comments are subjective*	No potential				
Multi-Season Potential - Nov to April • *Comments are subjective*	Limited potential to generate travel in some regions of the province for a portion of the November to April period				

PRODUCT: DOWNHILL SKIING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	In Atlantic Canada, downhill ski product has some competitive advantages - accessible, family skiing, events, etc. Outside of the region, ski product is not competitive and has very limited appeal, if any				
Latent Resource Quality/Potential • *Comments are subjective*	Nova Scotia's resource potential is limited - suitable terrain, snow cover, length of season				
Constraints to Growth • *Comments are subjective*	Some significant constraints to growth - natural resources; small, aging local population				

REGIONAL SCORES

Downhill Skiing	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	0.6	2	▨	2	2	▨	0	▨
Latent Resource Quality	2	2	▨	2	2	▨	0	▨
Constraints to Growth	2	2	▨	3	2	▨	0	▨
Percent of Perfect Score	29%	40%	▨	46%	40%	▨	0%	▨

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:
Downhill Skiing

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	POINTS (Excl. Europe)
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size - estimated visitation for primary ar	3	1	3	0	0	0	0	0	0	0	0	3
Visitor Satisfaction Levels NO DATA	3		0		0		0		0		0	0
Potential Market Size	5	1	5	1	10	1	10	1	15	1	20	40
Role of the Product as a Travel Motivator	5	1	5	1	10	1	10	1	15		0	40
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	0	0	0	0	0	0	0	0	0	0	0
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	2	1	1	1	1	1	1	1.5	0	0	5
Growth Potential	4	0	0	0	0	0	0	2	24	0	0	24
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	0	0	0	0	0	0	0	0	0	0	0
November to April	5	2	10	0	0	0	0	0	0	0	0	10
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*30*	**24.0**	*30*	**21.0**	*30*	**21.0**	*30*	**55.5**	*25*	**20.0**	**122**
Score as % of a Perfect Score			16%		7%		7%		12%		4%	10%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	1	15	0	0	0	0	0	0	38
Latent Resource Quality/Potential	6	2	12	2	24	2	24	2	36	2	48	96
Product Potential - Constraints/Capacity for Growth	6	2	12	2	24	2	24	2	36	2	48	96
Sub total: Product Related Criteria		*19.5*	**46.5**	*19.5*	**63.0**	*19.5*	**48.0**	*19.5*	**72.0**	*19.5*	**96.0**	**230**
Score as % of a Perfect Score			48%		32%		25%		25%		25%	29%
TOTAL: MARKET AND PRODUCT CRITERIA		**49.5**	**71**	**49.5**	**84**	**49.5**	**69**	**49.5**	**128**	**44.5**	**116**	**351**
Score as % of a Perfect Score			28%		17%		14%		17%		13%	18%

NOTES:

REGIONAL COMMENTS

Cape Breton
Limited USP - one facility (Cape Smokey); resource quality is moderate but accessibility and limited service availability are major constraints to development.

South Shore N/A

Eastern Shore N/A

Annapolis Valley
Limited USP - only one ski area (Martock) but with strong market presence, good facilities, extensive programming. Resource quality is moderate. No major constraints to further development, other than weather conditions.

Northumberland Shore
No USP - no ski areas operating at present though one small facility exists.

Fundy Shore
Limited USP - one ski area operating (Wentworth); good quality facilities and programs but further development constrained by weather conditions.

Halifax Urban Area N/A

DOWNHILL SKIING

MARKET READINESS ISSUES

- Quality of skiing (vertical, snow conditions, extent of runs) not sufficient to attract much demand from out of the Atlantic region

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Weather/snow conditions
- Limited market in Atlantic Canada

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Packages aimed at non-avid participant including accommodations, equipment rental, dining/evening entertainment options

PRODUCT: SNOWMOBILING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
PRODUCT CRITERIA					
Current Uniq[illegible]elling Proposition • *Comments are subjective*	Nova Scotia not generally seen to be a destination for snowmobiling compared to other areas such as New Brunswick and Newfoundland				
Latent Resource Quality/Potential • *Comments are subjective*	Potential limited to only a few regions of the province that have suitable/consistent snow cover, i.e. Cape Breto and Northern Nova Scotia				
Constraints to Growth • *Comments are subjective*	Suitable, reliable consistent snow cover a major constraint to developing this product for out-of-province markets				

REGIONAL SCORES

Snowmobiling	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	0.02	3	▨	1	3	1	3	▨
Latent Resource Quality	2	3	▨	1	3	1	2	▨
Constraints to Growth	2	2	▨	1	2	1	2	▨
Percent of Perfect Score	27%	54%	▨	20%	54%	20%	48%	▨

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:
Snowmobiling

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	POINTS (Excl. Europe)
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size (1)	3	1	3	1	6	0	0	0	0		0	9
Visitor Satisfaction Levels - NO DATA	3		0		0		0		0		0	0
Potential Market Size	5	1	5	1	10	1	10	1	15		0	40
Role of the Product as a Travel Motivator	5	1	5	1	10	1	10	1	15		0	40
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	0	0	0	0	0	0	0	0	0	0	0
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	2	4	4
Growth Potential	4	3	12	3	24	3	24	3	36		0	96
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	0	0	0	0	0	0	0	0	0	0	0
November to April	5	2	10	0	0	0	0	2	30	2	40	40
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*30*	**35.5**	*30*	**51.0**	*30*	**45.0**	*30*	**97.5**	*13*	**44.0**	**229**
Score as % of a Perfect Score			24%		17%		15%		22%		17%	19%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	2	15	0	0	0	0	0	0	0	0	15
Latent Resource Quality/Potential	6	2	12	2	24	2	24	2	36	2	48	96
Product Potential - Constraints/Capacity for Growth	6	2	12	2	24	2	24	2	36	2	48	96
Sub total: Product Related Criteria		*19.5*	39.0	*19.5*	**48.0**	*19.5*	**48.0**	*19.5*	**72.0**	*19.5*	**96.0**	**207**
Score as % of a Perfect Score			40%		25%		25%		25%		25%	27%
TOTAL: MARKET AND PRODUCT CRITERIA		**49.5**	**75**	**49.5**	**99**	**49.5**	**93**	**49.5**	**170**	**32.5**	**140**	**436**
Score as % of a Perfect Score			30%		20%		19%		23%		22%	22%

NOTES:

1 Refers to CTS data on participation in snowmobiling on overnight trips for Canadians overall (0.8% of total trips), US data refers to population participation in snowmobiling (National Survey on Recreation and the Environment), discounted by 90% to guesstimate the number that would travel for the activity. Applied to existing November to April trips to Nova Scotia from each market.

REGIONAL COMMENTS

Cape Breton
Moderate USP - network of trail development existing and ongoing further development, good snow cover, appeal of Highlands area.

Good quality natural resources - variety of landscapes, scenic; basic facilities and services are spread out.

Inconsistent snow conditions are major constraint to further development.

South Shore
Virtually no product - weather conditions mean that snow cover is very limited.

Annapolis Valley
Very limited USP; some trails in inland areas but further development constrained by inconsistent weather conditions.

Eastern Shore
Very limited USP; some trails in inland areas and under development (e.g. Guysborough Rail Trail) and latent resource potential for further trail development.

Inconsistent weather conditions and limited snow cover is a major constraint to further development.

Northumberland Shore
Moderate USP - network of trail development linking in to Cobequid Mountains; snow conditions tend to be more consistent than some other areas of the province.

Moderate quality natural resource for further development - inland areas of Pictou, Antigonish Counties, Colchester and Cumberland Counties.

Inconsistent snow conditions major constraint to further development.

Fundy Shore
Moderate USP - network of trail development through Cobequid Mountains; snow conditions in these areas more consistent.

Moderate quality natural resource for further development; some potential to link into New Brunswick trails.

Inconsistent snow conditions major constraint to further development.

Halifax Urban Area N/A

SNOWMOBILING

MARKET READINESS ISSUES

- Approximately 20 snowmobile club trails in province
- Trans Canada Trail will provide additional routing across the province from NB through Cape Breton
- Significant amount of development work still needed
- Potential quality/extent of snowmobile product is such that it is only of potential in the provincial and regional marketplace

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Inconsistent snow cover in much of province is a major constraint

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Additional trail development, signage, grooming, and support infrastructure such as gas service, accommodations, restaurants in appropriate areas, is required to create a quality product. Best opportunities are in Cape Breton and northern Nova Scotia (Cumberland County, Wentworth area, etc.) because of snow cover
- Special events - rallies, guided treks,
- Develop packages - including accommodation, trail maps and route suggestions, equipment rental if needed, suggestions for dining and entertainment and non-snow activities in case of inclement weather
- Weekend family packages featuring learning the activity with personalized instruction, equipment rentals and family-oriented evening activities

PRODUCT: CROSS COUNTRY SKIING

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Data from Canadian Travel Survey; participation in cross country skiing on trip to Nova Scotia, data is for all Canadians, not available by origin. US data an estimate.*	0.9% participation rate; 3,900 persons **Score: 1**	0.9% participation rate; 800 persons **Score: 1**	0.9% participation rate; Less than 200 persons **Score: 0**	0.5% participation rate Less than 100 persons **Score: 0**	N/A
Visitor Satisfaction Levels	N/A	N/A	N/A	N/A	N/A
Potential Market Size • *Based on data from consumer research done for NS November to May Study; potential interest in visiting NS for winter trip including cross country skiing* • *Applied to total winter trips in Canada, inter-provincial, from CTS*	5.6% Potential Market: 15.8 thousand person trips **Score: 1**	6% Potential Market: 35.9 thousand person trips **Score: 1**	6% Potential Market: 23 thousand person trips **Score: 1**	5.3% Potential Market: 32.2 thousand person trips **Score: 1**	N/A
Role as a Travel Motivator • *Based on data from consumer research done for NS November to May study*	5.6% **Score: 1**	6% **Score: 1**	6% **Score: 1**	5.3% **Score: 1**	N/A
Role as a Demand Supporter • *Comments are subjective*	Not a contributing factor in destination selection for the touring market, the meetings and incentive travel market or the urban destination market. Some very limited contribution to the winter vacation destination market from Atlantic Canada, New England/mid-Atlantic and Europe				
Growth Potential • *Canadian data from Canadian Ski Council reports; US Data from US Forest Service Study;*	Data indicates no growth in participation in cross country skiing in the Canadian market Score: 0			24.5% Increase in number of participants, 1982 to 1994 **Score: 2**	N/A
Multi-Season Potential - Shoulder • *Comments are subjective*	No potential				

PRODUCT: CROSS COUNTRY SKIING					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
Multi-Season Potential - Nov to April • *Comments are subjective*	Some very limited potential in a few areas of the province which have suitable snow conditions, to contributed t generating trips from the Atlantic Canada market, and to a lesser extent the New England/Mid-Atlantic and European markets				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	No competitive advantages/USP outside of the Atlantic market				
Latent Resource Quality/Potential • *Comments are subjective*	Natural resources good for cross country skiing in some regions of the province, but quality of the experience limited by inconsistent snow cover				
Constraints to Growth • *Comments are subjective*	Inconsistent snow a major constraint to future growth.				

REGIONAL SCORES

Cross Country Skiing	**Average Prov'l Score**	**Cape Breton**	**South Shore**	**Annapolis Valley**	**Fundy Shore**	**Eastern Shore**	**Northumb. Shore**	**Halifax Urban**
		Score	Score	Score	Score	Score	Score	Score
Current USP	0.2	3	0	1	2	0	2	
Latent Resource Quality	2	2	1	2	3	2	2	
Constraints to Growth	2	3	2	2	3	2	2	
Percent of Perfect Score	27%	54%	18%	32%	52%	25%	40%	

REGIONAL COMMENTS

Cape Breton
Strongest USP in the province for cross country skiing - better snow cover than elsewhere, trails developed in National Park and a variety of other areas throughout the Island (e.g. Margaree Valley, Gaelic College, Cape North areas); winter packages through Keltic Lodge.

Reasonable quality resources - good natural landscapes, potential for more trail development but inconsistent weather, accessibility and limited services during winter are constraints to further development.

South Shore
No USP at present;

Resource potential limited primarily due to weather conditions - variety of areas suitable for cross country ski trail development but generally poor snow cover a major constraint to future development.

Annapolis Valley
Limited USP - some product primarily in Kejimkujik National Park - good trail development but snow cover inconsistent

Some resource potential for further development in inland areas but weather and inconsistent snow are significant constraint to further development.

Eastern Shore
No USP at present - no trail development

Some limited resource potential for further development in inland areas but weather and inconsistent snow are significant constraint to further development.

Northumberland Shore
Limited USP - some trail development in the Antigonish area (Beaver Mountain Park, Golf Club)

Moderate resource potential for further development.

Weather conditions and snow cover are constraints to further development.

Fundy Shore
Limited USP at present - some trails at Ski Wentworth and Five Islands Park.

Reasonable resource potential for further development - better/more consistent snow cover than many regions of the province, potential for additional trail development in Cobequid Mountain areas.

Halifax Urban Area
Virtually no product and little potential due to very limited and inconsistent snow cover.

CROSS COUNTRY SKIING

MARKET READINESS ISSUES

- Cross country ski trails (25+) located in designated areas around the province, with heaviest concentration in Cape Breton; also a large number of unofficial trails
- Quality varies - some are groomed trails, others are in parks;
- Poor snow cover in many regions of the province

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Limited market
- Weather/snow conditions
- Capital and maintenance costs

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Packages including accommodation, trail maps and suggested routes, equipment rental, dining and evening entertainment
- Special events including ski safaris, ski races/loppetts and ski treks
- Weekend family packages featuring "learning to ski"

PRODUCT: BAY OF FUNDY NATURE PRODUCT

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Estimated based on data from 1996 Exit Survey, participation in "Fundy Ecotour"; whale watching, etc.*	**Estimated Score: 2**	**Estimated Score: 3**	**Estimated Score: 1**	**Estimated Score: 2**	**Estimated Score: 1**
Visitor Satisfaction Levels • *No data*	N/A	N/A	N/A	N/A	N/A
Potential Market Size • *Score estimated based on general interest in nature activities and ecotourism*	**Estimated Score: 2**	**Estimated Score: 4**	**Estimated Score: 3**	**Estimated Score: 3**	N/A
Role as a Travel Motivator • *Score estimated based on general interest in nature activities and ecotourism*	**Estimated Score: 2**	**Estimated Score: 4**	**Estimated Score: 3**	**Estimated Score: 3**	N/A
Role as a Demand Supporter • *Comments are subjective*	Seen to be an important contributing factor in destination selection for touring market, particularly for Ontario, New England/mid-Atlantic and European Not important to the meetings/convention market or the urban destination market Limited importance as a supporting activity for the vacation destination market				
Growth Potential • *Estimated based on growth in adventure/ecotourism*	**Estimated Score: 3**	**Estimated Score: 4**	**Estimated Score: 4**	**Estimated Score: 4**	**Estimated Score: 4**
Multi-Season Potential - Shoulder • *Comments are subjective*	Product has moderate potential to contribute to growing shoulder season tourism, particularly for the fall season and from markets with a stronger interest in adventure and ecotourism such as Ontario and New England/mid-Atlantic areas				
Multi-Season Potential - Nov to April • *Comments are subjective*	Some very limited potential to contribute to regional trips in the November to April period, for activities such as eagle watching.				

PRODUCT: BAY OF FUNDY NATURE PRODUCT					
CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Nova Scotia's Fundy Nature product does not have a particularly strong competitive advantage/USP at present - New Brunswick has been aggressively promoting their Fundy product and are the "recognized" destination				
Latent Resource Quality/Potential • *Comments are subjective*	Natural resource is of high quality with potential for a wide variety of adventure, nature, ecotourism and interpretive experiences				
Constraints to Growth • *Comments are subjective*	No major constraints to growth although the capacity of the resource to accommodate visitors will be a limiting factor				

REGIONAL SCORES

Bay of Fundy Nature Product	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	2.2			3	2			
Latent Resource Quality	4			4	4			
Constraints to Growth	3			3	3			
Percent of Perfect Score	60%			66%	58%			

REGIONAL COMMENTS

Annapolis Valley
Currently stronger USP than the Fundy Shore for activities related to the Bay of Fundy, such as whale watching, birding, viewing tides, etc.

Excellent quality natural resource with good potential to build more product and expand/enhance existing product.

No major constraints to growth.

Fundy Shore
Region traditionally not as well known for Fundy related product but this is changing with Fundy EcoTour project, (development and marketing)

Excellent quality natural resources associated with Bay of Fundy to use as a foundation for more/enhanced product - including tides, tidal flats, unique features such as Five Islands, birdwatching, coastal hiking, etc. No major constraints to further development.

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:

Bay of Fundy Nature Product

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	**POINTS**
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		**(Excl.**
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		**Europe)**
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	2	6	3	18	1	6	2	18	1	12	48
Visitor Satisfaction Levels - NO DATA	3		0		0		0		0		0	0
Potential Market Size	5	2	10	4	40	3	30	3	45		0	125
Role of the Product as a Travel Motivator	5	2	10	4	40	3	30	3	45		0	125
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	2	2.5	4	10	3	7.5	4	15	4	20	35
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	1	0.5	2	2	1	1	2	3	1	2	7
Growth Potential (adventure/ecotourism)	4	3	12	4	32	4	32	4	48	4	64	124
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	2	10	3	30	2	20	3	45	2	40	105
November to April	5	1	5	0	0	0	0	0	0	0	0	5
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*30*	**56.0**	*30*	**172.0**	*30*	**126.5**	*30*	**219.0**	*20*	**138.0**	**574**
Score as % of a Perfect Score			37%		57%		42%		49%		35%	48%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	2	15	3	45	2	30	2	45	2	60	135
Latent Resource Quality/Potential	6	4	24	4	48	4	48	4	72	4	96	192
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		*19.5*	**57.0**	*19.5*	**129.0**	*19.5*	**114.0**	*19.5*	**171.0**	*19.5*	**228.0**	**471**
Score as % of a Perfect Score			58%		66%		58%		58%		58%	60%
TOTAL: MARKET AND PRODUCT CRITERIA		**49.5**	**113**	**49.5**	**301**	**49.5**	**241**	**49.5**	**390**	**39.5**	**366**	**1045**
Score as % of a Perfect Score			46%		61%		49%		53%		46%	53%

NOTES:

BAY OF FUNDY NATURE PRODUCT

(For additional details on the comments provided here, see the series of reports prepared on behalf of The Bay of Fundy Product Club.

MARKET READINESS ISSUES

- Limited interpretive material available, other than that associated with the Fundy Shore Ecotour
- Limited interpretive facilities
- Inconsistent signage throughout Nova Scotia's Bay of Fundy region - Fundy Shore Ecotour signage only covers part of the area
- Lack of site-based interpretive signage and other information
- Limited basic services in some areas - accommodation, restaurants, etc., and also quality not always appropriate for the market that has been identified
- Quality of roads is poor in some parts of the region
- Limited site-based infrastructure - look offs, trails, parking, etc.

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Developing the destination on a sustainable basis
- Mobilizing the private sector to implement opportunities
- Availability of funding

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Joggins Fossil Cliffs - being considered for UNESCO World Heritage Site status
- Establish Ecozone Discovery Centres for three different ecozones - Fundy Aquarium, Sea Cliffs & Fossils, World's Highest Tides - could be new facilities/interpretive centres or be incorporated into existing facilities
- Basic infrastructure development at key sites - trails, parking, access, look offs, interpretive signage, telescopes to allow viewing without disturbing birds, etc.
- Comprehensive visitor guide of the entire Fundy area - potentially two different themes - Natural History, Cultural History
- Consistent, clear and strategically located signage throughout the entire region
- Site-based interpretive material - guides and signage
- Guided and self-guided tours and packages on themes such as:
    - Marine Mammals
    - Photography
    - Sailing
    - Shore Birds
    - Ecology
    - Acadian Culture
    - Dinosaurs
    - Walking/Hiking
    - Flora/Fauna
    - Tides
    - Age of Sail
    - Aboriginal Culture

PRODUCT: DESTINATION ACCOMMODATIONS (Resorts, Quality Cottages)

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Latent Resource Quality/Potential • *Comments are subjective*	Natural resources are excellent quality for destination accommodation development - scenic, coastal, generally readily accessible to airport and transportation corridors				
Constraints to Growth • *Comments are subjective*	No major constraints to growth that cannot be influenced				

REGIONAL SCORES

Destination Accommodations	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	2.1	3	4	2	1	1	1	4
Latent Resource Quality	4	3	4	2	3	3	3	3
Constraints to Growth	4	3	3	3	3	3	3	2
Percent of Perfect Score	66%	60%	74%	46%	45%	45%	45%	62%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:
Destination Accommodations (Resorts, Quality Cottages)

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL POINTS (Excl. Europe)
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	1	3	1	6	1	6	2	18	1	12	33
Visitor Satisfaction Levels - NO DATA	3		0		0		0		0		0	0
Potential Market Size	5	3	15	4	40	4	40	3	45	3	60	140
Role of the Product as a Travel Motivator	5	4	20	3	30	3	30	3	45	2	40	125
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	3	3.75	4	10	4	10	5	18.75	4	20	43
- Meetings and Incentive Travel Market	0.75	3	2.25	3	4.5	3	4.5	1	2.25	0	0	14
- Urban Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
- Vacation Destination Market	0.5	5	2.5	5	5	5	5	5	7.5	5	10	20
Growth Potential	4	2	8	3	24	3	24	3	36	3	48	92
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	4	20	4	40	4	40	3	45	4	80	145
November to April	5	3	15	1	10	1	10	0	0	1	20	35
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*30*	**90.0**	*30*	**170.5**	*30*	**170.5**	*30*	**219.0**	*30*	**292.0**	**650**
Score as % of a Perfect Score			60%		57%		57%		49%		49%	54%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	2	30	2	30	2	45	2	60	128
Latent Resource Quality/Potential	6	4	24	4	48	4	48	4	72	4	96	192
Product Potential - Constraints/Capacity for Growth	6	4	24	4	48	4	48	4	72	4	96	192
Sub total: Product Related Criteria		*19.5*	**70.5**	*19.5*	**126.0**	*19.5*	**126.0**	*19.5*	**189.0**	*19.5*	**252.0**	**512**
Score as % of a Perfect Score			72%		65%		65%		65%		65%	66%
TOTAL: MARKET AND PRODUCT CRITERIA		**49.5**	**161**	**49.5**	**297**	**49.5**	**297**	**49.5**	**408**	**49.5**	**544**	**1162**
Score as % of a Perfect Score			65%		60%		60%		55%		55%	59%

NOTES:

REGIONAL COMMENTS

Cape Breton
Moderate USP - some areas established destinations such as Ingonish, Dundee, Baddeck but range of product, particularly with full range of services and recreational facilities, is limited.

Good quality natural resources for this product - range of experiences available, scenery, golf courses, appealing destination.

No major constraints to further development.

South Shore
Strongest USP in the province for this product - a number of existing resort and cottage properties currently catering to this market and established, apparently unsatisfied demand for more facilities. However, product is generally not competitive to a North American standard.

Natural resource suggest considerable latent potential - quality coastal sites, beaches, proximity to urban areas/airport, range of activities and experiences available; potential for shoulder and off-season demand.

No major constraints to further development though availability of suitable land (coastal) at reasonable prices could present a challenge.

Annapolis Valley
Limited USP at present - tends to be more of a transient area for accommodations other than Digby Pines; some heritage inns may function as destination accommodation. Little in the way of cottage development.

Natural resources of moderate quality for further development - do not lend themselves to ocean/sea side cottages/resorts as is the case in many other parts of the province.

No major constraints to further development.

Eastern Shore
USP very limited at present - only one significant property (Liscombe Lodge) and a few small inns.

Natural resources of the area suggest good potential for this product - availability of coastal lands, variety of activities, beaches, but limited infrastructure and services. No major constraints to further development.

Northumberland Shore
USP very limited at present - only one significant property (Pictou Lodge) and a few cottage developments.

Natural resources of the area suggest good potential for this product - availability of beaches/coastal lands, variety of activities, basic infrastructure in numerous communities. Availability of suitable coastal lands may be a challenge/constraint given level of private cottage development in this area.

Fundy Shore
USP very limited at present - only one significant property (Pictou Lodge) and a few cottage developments.

Natural resources of the area suggest good potential for this product - availability of beaches/coastal lands, variety of activities, but basic infrastructure in the area is somewhat limited. Accessibility a constraint to further development; otherwise no major constraints.

Halifax Urban Area
Strong USP - number of quality existing properties that cater to the "urban" destination market though there are gaps in supply - first class properties, small "boutique" hotels/inns.

Moderate resource potential for further development.

Constraints to development include availability of suitable property/land.

DESTINATION ACCOMMODATIONS

MARKET READINESS ISSUES

- Appears to be insufficient supply in some regions of the province, of quality destination accommodations, particularly cottages, to accommodate demand
- Substantial portion of the product does not meet current standards/consumer expectations with respect to quality, nature of facilities and services provided

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Economic viability
- Financing
- Availability and price of suitable land
- Seasonality

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Explore new (to Nova Scotia) models for successful development concepts, such as time share/rental management (real estate based) concepts - perhaps host a product "study trip" to learn about these concepts
- Make potential investors/developers aware of consumer demands and expectations
- Encourage multi-season product development
- Expand destination packaging/promotions in shoulder and November to May period

PRODUCT: MEETINGS AND CONVENTIONS - HALIFAX

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Score estimated based on estimate of meetings and conventions activity in Halifax*	**Estimated Score: 3**	**Estimated Score: 2**	**Estimated Score: 1**	**Estimated Score: 1**	N/A
Visitor Satisfaction Levels • *Data from survey of meeting planners in Atlantic Canada Meetings and Incentive Travel Study (small sample)*	**Estimated Score: 5**	**Estimated Score: 5**	**Estimated Score: 5**	**Estimated Score: 5**	N/A
Potential Market Size • *Score estimated based on data on Canadian and US meetings and incentive travel markets*	**Estimated Score: 3**	**Estimated Score: 4**	**Estimated Score: 3**	**Estimated Score: 2**	**Estimated Score: 1** (some limited potential from incentive travel market)
Role as a Travel Motivator • *By its nature, meetings and conventions are the travel motivator for this product*	**Score: 5**	**Score: 5**	**Score: 5**	**Score: 5**	**Estimated Score: 2**
Role as a Demand Supporter • *Comments are subjective*	Of some limited appeal in strengthening NS for the touring market - meetings and conventions can generate pre-post meeting touring trips Critical factor in destination choice for meetings and conventions market Important activity for much of the urban destination market and also of interest to part of the vacation destination market - meetings and conventions frequently generate business/pleasure trips that use urban or vacation destinations				
Growth Potential • *Estimated scores based on North American experience over past decade*	**Estimated Score:** 3 for Canadian market, based on US experience			**Score: 3**	N/A
Multi-Season Potential - Shoulder • *Comments are subjective*	Has strong appeal/potential in the fall months to contribute to generating travel to Nova Scotia and also, to a lesser extent, in the spring months, particularly from the regional marketplace, Ontario and Quebec; appeal not as strong in the New England/mid-Atlantic or European markets				

PRODUCT: MEETINGS AND CONVENTIONS - HALIFAX

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Multi-Season Potential - Nov to April • *Comments are subjective*	Strong potential to generate travel from the regional marketplace; Limited potential to generate travel from Ontario and Quebec				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Halifax product has a strong USP in the regional marketplace - mix of hotels, capacity, convention centre, air access, casino, urban dining and entertainment experiences In Ontario and Quebec markets, USP/competitive advantages not as strong, although the seacoast, seafood and friendly hospitality are advantages - and there is strong competition from easily accessible destinations USP and competitive advantages much weaker in the US, combined with air access challenges				
Latent Resource Quality/Potential • *Comments are subjective*	Halifax product is of reasonably good quality; air access and quality hotel room capacity are major challenges				
Constraints to Growth • *Comments are subjective*	Few barriers to growth in Atlantic Canada market; some challenges to growing demand from other markets that are difficult to influence (e.g. air access)				

REGIONAL SCORES N/A - Product only in one region

REGIONAL COMMENTS Not Applicable; product only in one region - see comments in table above.

MEETINGS AND CONVENTIONS
(Halifax and rest of Province)

MARKET READINESS ISSUES
- Availability of hotel space in Halifax a constraint to increasing business in shoulder seasons
- Total hotel capacity in Halifax a constraint for major conventions
- Readiness of accommodation plant to meet consumer demands for access to technology
- Quality of meeting space/accommodations outside Halifax frequently not up to contemporary standards, particularly for markets from outside the region

COSTS/CHALLENGES TO FURTHER DEVELOPMENT
- Air access - direct flights, costs, type of equipment, frequency of service
- Accessibility of facilities outside of Halifax urban area - distance to airport, transportation services
- Total capacity to host major conventions in Halifax - accommodations, meeting space, infrastructure

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES
- Improved audio-visual and computer technology, Internet connections, etc. in meeting facilities
- Hotel rooms with up-to-date technology/communications - Internet connections, voice mail, data port, etc.
- More meeting facilities in proximity to golf courses and at 4/5 Star properties
- Packaging to encourage pre and post visits, particularly in the shoulder and November to May period

PRODUCT: MEETINGS AND CONVENTIONS - NON- HALIFAX

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Score estimated based on data in the Atlantic Canada Meetings and Incentive Travel Study*	Estimated at 19,000 to 45,000 persons **Score: 2**	Estimated at 1,300 to 19,300 persons **Score: 1**	Estimated at less than 1,300 persons **Score: 0**	Estimated at less than 1,300 persons **Score: 0**	Estimated at less than 1,300 persons **Score: 0**
Visitor Satisfaction Levels • *Estimated based on data from survey of meeting planners in Atlantic Canada Meetings and Incentive Travel Study (small sample)*	**Estimated Score: 4**	**Estimated Score: 3**	**Estimated Score: 3**	**Estimated Score: 3**	N/A
Potential Market Size • *Score estimated based on market size for Halifax and potential interest from each market in meetings/conventions outside of Halifax*	**Estimated Score: 3**	**Estimated Score: 2**	**Estimated Score: 1**	**Estimated Score: 1**	**Estimated Score: 0**
Role as a Travel Motivator • *By its nature, meetings and conventions are the travel motivator for this product*	**Score: 5**	**Score: 5**	**Score: 5**	**Score: 5**	**Estimated Score: 2**
Role as a Demand Supporter • *Comments are subjective*	Of some limited appeal in strengthening NS for the touring market - meetings and conventions can generate pre-post meeting touring trips Critical factor in destination choice for meetings and conventions market Of limited appeal for the urban destination market since most of these facilities for this product are in rural area Of interest/appeal to part of the vacation destination market - meetings and conventions frequently generate business/pleasure trips that use urban or vacation destinations				
Growth Potential • *Estimated scores based on North American experience over past decade*	**Estimated Score: 3** for Canadian market, based on US experience			**Score: 3**	N/A

PRODUCT: MEETINGS AND CONVENTIONS - NON- HALIFAX

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Multi-Season Potential - Shoulder *• Comments are subjective*	Has strong appeal/potential in the fall months to contribute to generating travel to Nova Scotia and also, to a lesser extent, in the spring months, particularly from the regional marketplace, Ontario and Quebec; appeal not as strong in the New England/mid-Atlantic or European markets				
Multi-Season Potential - Nov to April *• Comments are subjective*	Strong potential to generate travel from the regional marketplace; Limited potential to generate travel from Ontario and Quebec				
PRODUCT CRITERIA					
Current Unique Selling Proposition *• Comments are subjective*	Product reasonably competitive in the Atlantic Canadian market but USP and competitive advantages are very limited in other markets, particularly in the US.				
Latent Resource Quality/Potential *• Comments are subjective*	Resource of moderate quality, compared to those available in competing destinations - particularly for markets from outside Atlantic Canada.				
Constraints to Growth *• Comments are subjective*	Few barriers to growth in the Atlantic Canada market. Access (distance from airport) a significant challenge to future growth from other markets.				

REGIONAL SCORES

Meeting and Convention Facilities: Non-Halifax	**Average Prov'l Score**	**Cape Breton**	**South Shore**	**Annapolis Valley**	**Fundy Shore**	**Eastern Shore**	**Northumb. Shore**	**Halifax Urban**
		Score	Score	Score	Score	Score	Score	Score
Current USP	0.6	3	3	2	2	1	1	
Latent Resource Quality	1.7	3	3	2	1	1	1	
Constraints to Growth	2.1	2	3	2	1	1	1	
Percent of Perfect Score	29%	54%	60%	40%	28%	20%	20%	

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PRODUCT:
Meetings and Conventions - non-Halifax

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	**POINTS (Excl Europe)**
Current Visitation to NS May to Oct 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	2	6	1	6	0	0	0	0	0	0	12
Visitor Satisfaction Levels	3	4	12	3	18	3	18	3	27		0	75
Potential Market Size	5	3	15	2	20	1	10	1	15	0	0	60
Role of the Product as a Travel Motivator	5	5	25	5	50	5	50	5	75		0	200
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	1	1.25	1	2.5	1	2.5	1	3.75	1	5	10
- Meetings and Incentive Travel Market	0.75	5	3.75	5	7.5	5	7.5	2	4.5	1	3	23
- Urban Destination Market	0.5	1	0.5	0	0	0	0	0	0	0	0	1
- Vacation Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
Growth Potential	4	3	12	3	24	3	24	3	36		0	96
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	3	15	3	30	2	20	2	30	1	20	95
November to April	5	3	15	0	0	0	0	0	0	0	0	15
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		33	**106.0**	33	**159.0**	33	**133.0**	33	**192.8**	21	**30.0**	**591**
Score as % of a Perfect Score			64%		48%		40%		39%		7%	45%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	3	22.5	1	15	0	0	0	0	0	0	38
Latent Resource Quality/Potential	6	3	18	2	24	2	24	1	18	1	24	84
Product Potential - Constraints/Capacity for Growth	6	3	18	2	24	2	24	2	36	2	48	102
Sub total: Product Related Criteria		19.5	**58.5**	19.5	**63.0**	19.5	**48.0**	19.5	**54.0**	19.5	**72.0**	**224**
Score as % of a Perfect Score			60%		32%		25%		18%		18%	29%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**165**	**52.5**	**222**	**52.5**	**181**	**52.5**	**247**	**40.5**	**102**	**814**
Score as % of a Perfect Score			63%		42%		34%		31%		13%	39%

NOTES:

REGIONAL COMMENTS

Cape Breton
Moderate USP, product primarily in Sydney and Baddeck.

Moderate resource quality/potential for further development - good natural resources but limited accommodation/meeting facility infrastructure and accessibility by air a major constraint to further development. Increasing profile of region for golf may enhance market positioning for meetings.

South Shore
Moderate USP; a few properties that cater to this market (White Point, Oak Island, some small inns)

Moderate resource quality/potential for further development - quality natural resources, some good accommodations but limited number, better access to airport than some other regions (at least in eastern part of this region).

Access/distance to airport still a constraint to further development.

Annapolis Valley
Limited USP; only a very few properties that cater to this market - Digby Pines is the main one, Old Orchard Inn, a few small inns.

Moderate potential for future growth/development - appropriate accommodation product is limited; access form airport a constraint to further development.

Eastern Shore
Current USP very limited - only one property catering to this market (Liscombe Lodge); primarily Halifax market.

Latent potential limited by lack of suitable accommodations, distance from airport/Halifax for much of the region create a major constraint to further development.

Northumberland Shore
Current USP very limited - some product in urban motor hotels and limited product at Pictou Resort.

Latent potential limited by lack of suitable accommodations, distance from airport.

Fundy Shore
Some USP primarily due to product in Truro area which is well-located for Atlantic regional market; product almost non-existent outside Truro.

Latent potential for further development limited for region outside of the Truro area due to accessibility/distance from airport, lack of suitable accommodation properties.

Halifax Urban Area N/A

See comments on Market Readiness, Costs/Challenges to Further Development and Product Development Opportunities under Meetings - Halifax

PRODUCT: GROUP TOURING					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
MARKET CRITERIA					
Existing Visitor Market Size • *Based on visitor statistics on motorcoach arrivals into NS in 1998*	24,300 persons **Score: 2**	9,000 persons **Score: 1**	3,800 persons **Score: 1**	20,700 persons **Score: 2**	N/A
Visitor Satisfaction Levels • *Estimated based on results of NS Motorcoach Study survey of 100 tour operators*	**Estimated Score: 2**	**Estimated Score: 2**	**Estimated Score: 2**	**Estimated Score: 1**	N/A
Potential Market Size • *No data available*	N/A	N/A	N/A	N/A	N/A
Role as a Travel Motivator	Scores estimated based on size of the market overall in North America and proportion of people that go on group tours.				
Role as a Demand Supporter • *Comments are subjective*	Major contribution as demand supporter to touring market from outside the region No contribution to meetings and convention market; Some very limited contribution to urban destination market and vacation destination market, since both of these types of products are sold by group tour operators				
Growth Potential • *Estimated scores based on North American experience over past decade*	**Estimated Score: 1**			**Estimated Score: 1**	N/A
Multi-Season Potential - Shoulder • *Comments are subjective*	Good potential to contribute to generating visitation to the province in the shoulder season, from markets outside Atlantic Canada; primarily due to appeal of fall colour touring season				
Multi-Season Potential - Nov to April • *Comments are subjective*	Some very limited potential from other Canadian markets in this period, if product/packages can be associated with major special event, Christmas themed events, high profile entertainment events.				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Nova Scotia has a strong USP as a group touring destination - research conducted for NS Motorcoach Study indicated very high awareness of NS as a good place for group tours, and positive reaction by those who had sent tours here.				

NOVA SCOTIA PRODUCT MARKET MATCH STUDY
PRODUCT:
Group Touring

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		POINTS (Excl. Europe)
Market Weight			1		2		2		3		4	
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size (1)	3	1	3	1	6	1	6	2	18		0	33
Visitor Satisfaction Levels	3	2	6	2	12	2	12	1	9		0	39
Potential Market Size - NO DATA	5		0		0		0		0		0	0
Role of the Product as a Travel Motivator	5	2	10	3	30	3	30	3	45	4	80	115
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	1	1.25	5	12.5	5	12.5	5	18.75	5	25	45
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	1	0.5	2	2	2	2	2	3	2	4	8
- Vacation Destination Market	0.5	1	0.5	2	2	2	2	2	3	1	2	8
Growth Potential	4	1	4	1	8	1	8	1	12		0	32
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	1	5	4	40	4	40	3	45	4	80	130
November to April	5	0	0	1	10	1	10	0	0	1	20	20
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		28	**30.3**	28	**122.5**	28	**122.5**	28	**153.8**	18	**211.0**	**429**
Score as % of a Perfect Score			**22%**		**44%**		**44%**		37%		59%	38%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	4	30	4	60	4	60	4	90	4	120	240
Latent Resource Quality/Potential	6	3	18	3	36	3	36	3	54	3	72	144
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		19.5	**66.0**	19.5	**132.0**	19.5	**132.0**	19.5	**198.0**	19.5	**264.0**	**528**
Score as % of a Perfect Score			68%		68%		68%		68%		68%	68%
TOTAL: MARKET AND PRODUCT CRITERIA		**47.5**	**96**	**47.5**	**255**	**47.5**	**255**	**47.5**	**352**	**37.5**	**475**	**957**
Score as % of a Perfect Score			41%		54%		54%		49%		63%	50%

NOTES:

1. **Based on 1997 Nova Scotia Visitor Statistics for motorcoach visitation.**

19/01/00

REGIONAL COMMENTS

Cape Breton
Strong USP due to Cabot Trail, fall colour, scenery, entertainment opportunities.

Latent potential for further development moderate - product is already well-developed in Cape Breton and constraints to further growth include capacity challenges during peak periods.

South Shore
Moderate USP - some attractions of appeal to this segment (e.g. Fisheries Museum, Peggy's Cove) but limited accommodation product; tends to be a day trip from Halifax.

Latent potential for further development moderate - other than scenery and a few attractions, there are not a lot of other appeals in the region for this market, except for smaller, special interest tours.

Annapolis Valley
Moderate USP - some attractions of appeal to this segment (e.g. Fort Anne, Port Royal, Whale watching) but limited accommodation product.

Latent potential for further development moderate - other than scenery and a few attractions, there are not a lot of other appeals in the region for this market, except for smaller, special interest tours.

Eastern Shore
Limited USP - only product of interest is Sherbrooke Village and general coastal touring; only one accommodation property that can accommodate coach tours.

Lack of accommodation capacity and attractions are constraints to further growth.

Northumberland Shore
Very limited USP at present - primarily a pass-through area; no major attractions/appeals of interest to group touring market.

Limited latent resource potential for further development - creates constraints to further growth.

Fundy Shore
Very limited USP at present - primarily a pass-through area; no major attractions/appeals of interest to group touring market though several smaller ones (Anne Murray Centre, Fundy Geological Museum)

Limited latent resource potential for further development; road conditions away from Highway 104 are a challenge for coaches; also very limited basic infrastructure - all contribute to creating constraints to further growth

Halifax Urban Area
Strong USP; usually one or two night stop-over for most tours visiting NS; variety of attractions (Halifax Citadel, Marine Museum, harbour tours), shopping, dining, entertainment.

Good quality resources for further development but growth constrained by accommodation capacity during peak periods.

GROUP TOURING

MARKET READINESS ISSUES

- Many attractions either open late in the spring and/or close early in September and/or do not offer their full program through the spring and fall touring seasons
- Many operators are not fully aware of how to cater to/service the motorcoach sector
- Shortage of accommodations, particularly quality properties, in key locations around the province
- Lack of suitable motorcoaches for fly-drive markets

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Sufficient accommodation capacity of appropriate quality in key locations, such as Halifax, Baddeck, Cabot Trail
- Access - distance and cost
- Availability of suitable and sufficient air lift into Halifax
- Motorcoach regulations and their impact on number, quality and type of coaches

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Develop packages, programs and itineraries including special discounts, expanded programming at attractions, special programs and activities, live shows and additional marketing support to tour operators to encourage demand during the May/June period, and through late October/early November
- Work with airlines to create more lift into Halifax from US and Canadian origin markets
- Review the motorcoach regulatory environment so as to eliminate the constraints created by these regulations on prices, rates, number and size of the coaches available, etc.
- Encourage upgraded and additional accommodations in areas where there is an insufficient supply of suitable accommodations for the motorcoach market
- Encourage more smaller tours which can use smaller accommodation properties
- Expand season and hours of operation of attractions
- Establish more "live entertainment" style programming to appeal to coach groups
- Extend shopping hours in key locations, including Sunday shopping
- Encourage operators to provide enhanced service to the motorcoach sector
- More rest stops and look offs along highways

PRODUCT: HALIFAX URBAN PRODUCT					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
MARKET CRITERIA					
Existing Visitor Market Size • *Total visitation from Estimating Tourist Visitation to the Halifax CMA: allocation by market estimated based on provincial visitation patterns*	**Score: 5**	**Score: 5**	**Score: 2**	**Score: 4**	**Score: 1**
Visitor Satisfaction Levels • *No data*	N/A	N/A	N/A	N/A	N/A
Potential Market Size • *Score estimated based on percentage of trips that included "seeing big modern cities" for Canadian and European markets: and % of total New England overnight trips to cities*	19% Potential Market: 310.3 thousand person trips **Score: 1**	19% Potential Market: 666.5 thousand person trips **Score: 2**	19% Potential Market: 364.2 thousand person trips **Score: 2**	2% Potential Market: 81,400 person trips **Score: 1**	56% Potential Market: 1.3 million person trips **Score: 3**
Role as a Travel Motivator • *Score estimated based on data used for potential market size: Canadian data from CTC Domestic Travel Study; European market from CTC Pleasure Travel Market Studies for UK and Germany*	19% **Score: 2**	19% **Score: 2**	19% **Score: 2**	2% **Score: 1**	56% **Score: 2**
Role as a Demand Supporter • *Comments are subjective*	Strong role as a demand supporter in all markets except vacation destination market. Halifax's range of attractions, heritage, dining, entertainment, shopping, waterfront, etc. experiences makes it an important part of many visits to the province. A crucial element for the meetings and convention market and the urban destinatio market, which are primarily Halifax based.				
Growth Potential	No data				
Multi-Season Potential - Shoulder • *Comments are subjective*	Excellent potential to generate trips for this product in the shoulder season. Wide range of experiences availabl means that experience is less weather-sensitive than some others. Spring and fall seasons also offer theatre, music, crafts shows which are not available to the same extent in the summer.				

PRODUCT: HALIFAX URBAN PRODUCT					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
Multi-Season Potential - Nov to April • *Comments are subjective*	Good potential to generate trips from the regional marketplace for city experiences/packages throughout the year, particularly if associated with special events or entertainment. Potential also from other markets was indicated in November to May research project.				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Product very competitive/strong USP in the Atlantic Canadian market but USP and competitive advantages are much more limited in other markets.				
Latent Resource Quality/Potential • *Comments are subjective*	Resource of excellent quality as far as the rest of Atlantic Canada goes but quality moderate compared to competing destinations				
Constraints to Growth • *Comments are subjective*	Few barriers to growth in the Atlantic Canada market. Air Access a challenge to future growth from other markets.				

REGIONAL SCORES N/A - Product only in one region

REGIONAL COMMENTS N/A - Product only in one region

NOVA SCOTIA PRODUCT MARKET MATCH STUDY
PRODUCT:
Halifax Urban Product including dining, entertainment, etc.

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL POINTS (Excl. Europe)**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size (1)	3	5	15	5	30	2	12	4	36	1	12	93
Visitor Satisfaction Levels	3		0		0		0		0		0	0
Potential Market Size (2)	5	1	5	2	20	2	20	1	15	3	60	60
Role of the Product as a Travel Motivator (2)	5	2	10	2	20	2	20	1	15	4	80	65
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	3	3.75	4	10	4	10	4	15	4	20	39
- Meetings and Incentive Travel Market	0.75	5	3.75	5	7.5	5	7.5	5	11.25	5	15	30
- Urban Destination Market	0.5	5	2.5	5	5	5	5	5	7.5	5	10	20
- Vacation Destination Market	0.5	2	1	2	2	2	2	2	3	2	4	8
Growth Potential - NO DATA	4		0		0		0		0		0	0
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	4	20	4	40	4	40	4	60	4	80	160
November to April	5	3	15	2	20	2	20	2	30	2	40	85
Market Awareness	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*26*	**76.0**	*26*	**154.5**	*26*	**136.5**	*26*	**192.8**	*26*	**321.0**	**560**
Score as % of a Perfect Score			58%		59%		53%		**49%**		62%	54%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	4	30	2	30	2	30	2	45	2	60	135
Latent Resource Quality/Potential	6	4	24	2	24	2	24	2	36	2	48	108
Product Potential - Constraints/Capacity for Growth	6	5	30	4	48	4	48	2	36	3	72	162
Sub total: Product Related Criteria		*19.5*	**84.0**	*19.5*	**102.0**	*19.5*	**102.0**	*19.5*	**117.0**	*19.5*	**180.0**	**405**
Score as % of a Perfect Score			86%		52%		52%		**40%**		**46%**	52%
TOTAL: MARKET AND PRODUCT CRITERIA		**45.5**	**160**	**45.5**	**257**	**45.5**	**239**	**45.5**	**310**	**45.5**	**501**	**965**
Score as % of a Perfect Score			70%		56%		52%		45%		55%	53%

NOTES:

1. Based on the origin proportion from the 1998 Nova Scotia visitor statistics represented by these markets applied to the estimates of visitation to Halifax from the 1996 ARA report (Estimating Tourist Visitation to the Halifax Census Metropolitan Area).

2. Represents the % of trips that included 'seeing big modern cities' for Canadian and Europe Markets, U.S. data represents % of total New England overnight trips to cities.

HALIFAX URBAN PRODUCT

MARKET READINESS ISSUES

- Wide range of experiences, attractions, restaurants, entertainment, etc. which form the Halifax urban product
- Capacity of accommodations from June through September is a constraint to further growth
- No first class/high end accommodation product in Halifax
- Limited efforts to promote/package late/early shoulder and November to May periods

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Lack of Sunday shopping a challenge to further development, particularly in the pre-Christmas period
- Economic viability and financing of new accommodation development
- Capacity constraints in peak periods
- Air access

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Packages to attract demand in the November to April period - shopping, entertainment based around major events, theatre/concert based, urban learning programs/workshops, city/county packages, getaways
- Address Sunday Shopping issue
- Continue to build/promote "Entertainment season" concept; look at major shows/concerts for the November to May period
- One or two major, off-season events in Halifax area - music/entertainment theme or multi-cultural theme
- Develop a major festival in the March Break period (can extend for 2 - 3 weeks because of different timing of March Break); include Blockbuster shows at Museums, music, entertainment, dining (lobster season?), shopping, etc.
- Additional accommodation? Upscale, high end inn/small hotel?
- More unique evening activities, such as dining/entertainment and special evening events at the Halifax Citadel National Historic Site, Pier 21, other attractions; e.g. use of Halifax Citadel for Shakespeare by the Sea program

PRODUCT: MARINE HERITAGE

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Scores estimated based on total visitation to a number of "marine heritage" facilities (Hector Quay, Maritime Museum, Fisheries Museum, Age of Sail Centre) allocated to geographic origins based on total visitation pattern*	Estimated Persons: 108,700 **Score: 4**	Estimated Persons:55,200 **Score: 3**	Estimated Persons: 12,600 **Score: 1**	Estimated Persons: 28,200 **Score:2**	Estimated persons: 5,700 **Score: 1**
Visitor Satisfaction Levels • *No data available*	N/A	N/A	N/A	N/A	N/A
Potential Market Size • *Estimated based on interest in cultural tourism*	Potential Market: 310.3 thousand person trips **Score: 2**	Potential Market: 2.2 million person trips **Score: 4**	Potential Market: 1.25 million person trips **Score: 3**	Potential Market: 2.6 million person trips **Score: 4**	Potential Market: 1.0 million person trips **Score: 3**
Role as a Travel Motivator • *Based on cultural tourism as a travel motivator*	40% **Score: 3**	65% **Score: 4**	65% **Score: 4**	65% **Score: 4**	45% **Score: 3**
Role as a Demand Supporter • *Comments are subjective*	Moderate role as demand supporter for all touring geographic market segments, particularly those from outside the region; marine heritage is broad product area with fairly widespread market appeal and NS has a range of unique appeals, products and heritage. Limited role as a demand supporter for meetings and incentive travel market and urban destination market Also some role as a demand supporter for vacation destination market, enhancing the appeal of the destination for vacation markets				
Growth Potential • *No data*	No data available.				
Multi-Season Potential - Shoulder • *Comments are subjective*	Good potential to contribute to generating demand during the shoulder season - range of product that is not weather sensitive, well-distributed around the province, some unique appeals/attractions such as lighthouses				

PRODUCT: MARINE HERITAGE

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Multi-Season Potential - Nov to April • *Comments are subjective*	Some limited potential to contribute to generating demand during the November to April period - particularly for products in the Halifax urban area				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Nova Scotia has some unique marine heritage stories and products though they are not developed to their potential and USP for this product is not strong at present.				
Latent Resource Quality/Potential • *Comments are subjective*	Excellent latent resource potential throughout the province with good opportunity for further development of this product. Potential products include shipping/sail heritage, shipbuilding, shipwrecks, naval stories, marine life, lighthouses, etc.				
Constraints to Growth • *Comments are subjective*	No major constraints to further development.				

REGIONAL SCORES

Marine Heritage	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	2	2	3	2	3	1	2	3
Latent Resource Quality	5	3	4	3	3	3	2	4
Constraints to Growth	3	3	3	2	2	3	3	3
Percent of Perfect Score	65%	52%	66%	46%	54%	45%	46%	66%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY

PRODUCT:

Marine Heritage

MARKET		ATL. CAN.		ONTARIO		QUEBEC		NEW ENG/MID ATL		EUROPE		TOTAL
Average Yield (1998)		$348		$762		$699		$927		$1,473		
Market Weight			1		2		2		3		4	POINTS (Excl. Europe)
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	4	12	3	18	1	6	2	18	1	12	54
Visitor Satisfaction Levels - NO DATA	3		0		0		0		0		0	0
Potential Market Size	5	2	10	4	40	3	30	4	60	3	60	140
Role of the Product as a Travel Motivator	5	3	15	4	40	4	40	4	60	3	60	155
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	2	2.5	3	7.5	3	7.5	3	11.25	3	15	29
- Meetings and Incentive Travel Market	0.75	1	0.75	1	1.5	1	1.5	1	2.25	1	3	6
- Urban Destination Market	0.5	1	0.5	1	1	1	1	1	1.5	1	2	4
- Vacation Destination Market	0.5	2	1	2	2	2	2	2	3	2	4	8
Growth Potential - NO DATA	4		0		0		0		0		0	0
Multi-Season Potential												
Shoulder Season (May/June, Sept/Oct)	5	3	15	3	30	3	30	3	45	3	60	120
November to April	5	1	5	1	10	1	10	1	15	1	20	40
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*26*	**61.8**	*26*	**150.0**	*26*	**128.0**	*26*	**216.0**	*26*	**236.0**	**556**
Score as % of a Perfect Score			48%		58%		49%		55%		45%	53%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	2	15	2	30	2	30	2	45	2	60	120
Latent Resource Quality/Potential	6	5	30	5	60	5	60	5	90	5	120	240
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		*19.5*	**63.0**	*19.5*	**126.0**	*19.5*	**126.0**	*19.5*	**189.0**	*19.5*	**252.0**	**504**
Score as % of a Perfect Score			65%		65%		65%		65%		65%	65%
TOTAL: MARKET AND PRODUCT CRITERIA		**45.5**	**125**	**45.5**	**276**	**45.5**	**254**	**45.5**	**405**	**45.5**	**488**	**1060**
Score as % of a Perfect Score			55%		61%		56%		59%		54%	58%

NOTES:

REGIONAL COMMENTS

Cape Breton
Weak USP at present; existing product is limited.

Moderate resource potential - St. Peter's Canal, story of ferry connection to Newfoundland

No major constraints to further development.

South Shore
Strongest USP in the province; products such as The Bluenose, Fisheries Museum, Lunenburg harbourfront, Privateer's Story in the Liverpool area, lighthouses, Peggy's Cove, Oak Island all part of the marine heritage of the region; also numerous small fishing villages, particularly in the southwestern most part of the region.

Good quality resource potential for further development.

No major constraints to further development.

Annapolis Valley
Existing product not well developed at present; limited existing interpretation/attractions based around marine heritage.

Moderate quality resource potential for further development including fishing heritage on Bay of Fundy; Clipper Ships, famous mariners such as Joshua Slocum and Donald McKay.

No major constraints to development.

Eastern Shore
Very limited USP at present - product is very limited although there are lighthouses (Port Bickerton).

Moderate quality resource potential for further development

Northumberland Shore
Limited USP at present - some product in Pictou (e.g. Hector Heritage Quay project), shipbuilding heritage.

Moderate quality resource for further development.

No major constraints.

Fundy Shore
Moderate USP at present - a number of products related to marine heritage including Age of Sail Heritage Centre, Cape d'Or Lighthouse, Avon Spirit and shipbuilding in Maitland area.

Good quality resource potential on which to base further development and potential to expand/enhance existing product - Marie Celeste story, Spencer's Island, shipbuilding heritage.

No major constraints to further development.

Halifax Urban Area
Moderate USP at present - a number of strong products in Halifax built around marine heritage (Maritime Museum, Titanic Exhibit and tours, Pier 21, Maritime Command Museum)

Strong latent resource potential for further development - a number of other stories that could be told such as the role of Halifax in Canada's navy, Georges Island, Cunard shipping line, etc.

No major constraints to further development.

MARINE HERITAGE

MARKET READINESS ISSUES

- Basic resource exists in numerous locations around the province but in many cases it is not developed at all, or not fully market-ready
- A number of sites/attractions exist that do interpret this theme (e.g. Age of Sail Heritage Centre) and others in the process of being developed (e.g. S.S. Atlantic site in Terence Bay)
- No coordinated/cooperative effort to link/package/promote the province's marine heritage product

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Access to coastal areas, both views and direct access to parks, protected areas, beaches etc.
- Continued divestiture by governments of elements of the province's marine heritage, such as lighthouses, wharves/docks
- Identifying the product - What is it/should it be? How can it best be made market-ready? How can it be promoted? What is the best way to make the experiences interesting and interactive?

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Protect and preserve the province's lighthouses, and, where appropriate, develop for tourism activities. Support efforts of the Lighthouse Product Club.
- Identify Best Practices of marine heritage interpretation that offer some ideas/lessons for Nova Scotia
- Expanded interpretation of the province's navy and shipbuilding history, including such things as shipbuilding as demonstration projects to appeal to visitors
- Expand Voyages Remembered program to include continued enhancements of current stories/sites as well as new sites
- Expanded interpretation of the province's marine heritage through a variety of vehicles - selected Nova Scotia Museum sites, community museums, special projects such as the Hector, efforts in communities such as Maitland, creating "interactive experiences with the sea"
- Develop learning vacations and/or education programs based on marine heritage
- Live re-enactments/interpretation of events important to the marine history/heritage of communities
- Expand range/scale of marine based opportunities - scuba, yacht chartering, sea kayaking, whale watching, coastal hiking and cycling, sightseeing cruises
- Catalogue products that exists and promote jointly

PRODUCT: LEARNING VACATIONS					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
MARKET CRITERIA					
Existing Visitor Market Size • *Data from NS Conversion Study for "educational seminars/courses" adjusted based on average factor for activities with data from both the Exit Survey and the Conversion Study*	1.5% 10,000 Persons **Score: 1**	2.4% 8,100 persons **Score: 1**	0.4% Less than 500 persons **Score: 0**	2.9% 5,000 persons **Score:1**	N/A
Visitor Satisfaction Levels • *1997 NS Conversion Study; % saying experience in with "attending educational seminars/courses" in NS was much better than experience elsewhere*	25% **Score: 2**	33% **Score: 3**	0% **Score: 0**	New England: 10% Mid-Atlantic: 33% **Score: 1**	N/A
Potential Market Size • *Data is from 1997 Conversion Study; % saying " educational seminars/courses" was important in decision to visit vacation destination* • *Applied to total person trips from the market, to or within Canada (inter-prov'l)*	5% Potential Market: 81.6 thousand person trips **Score: 2**	4% Potential Market: 140.3 thousand person trips **Score: 1**	8% Potential Market: 153.4 thousand person trips **Score: 1**	8.5% Potential Market: 345.9 thousand person trips **Score: 2**	N/A
Role as a Travel Motivator • *Data is from 1997 Conversion Study; % saying "educational seminars/courses" was important to decision to visit vacation destination*	5% **Score: 1**	4% **Score: 1**	8% **Score: 1**	8.5% **Score: 1**	
Role as a Demand Supporter • *Comments are subjective*	Some limited potential to contribute to generating trips for the touring market Not likely to make a contribution to the meetings/convention market or to the urban destination market Some potential to contribute to generating trips for the vacation destination market, particularly from Atlantic Canada and Ontario				

PRODUCT: LEARNING VACATIONS					
CRITERIA	**ATLANTIC CANADA**	**ONTARIO**	**QUEBEC**	**NEW ENGLAND MID-ATLANTIC**	**EUROPE**
Growth Potential • *Estimated scores based on reports that learning vacation market is one of the fastest growing markets*	**Estimated Score: 2**	**Estimated Score: 3**	**Estimated Score: 2**	**Estimated Score: 3**	N/A
Multi-Season Potential - Shoulder • *Comments are subjective*	Reasonably good potential to contribute to generating trips in this period, particularly from Canadian markets				
Multi-Season Potential - Nov to April • *Comments are subjective*	Some potential to contribute to generating trips in this period, particularly from Canadian markets, based on dat from the NS November to May study				
PRODUCT CRITERIA					
Current Unique Selling Proposition • *Comments are subjective*	Current product very limited, NS has no USPs in this product area				
Latent Resource Quality/Potential • *Comments are subjective*	Excellent resources on which to build learning vacation experiences - natural, cultural, heritage, crafts, etc.				
Constraints to Growth • *Comments are subjective*	No major constraints to growth; challenge is to create partnerships and products				

REGIONAL SCORES

Learning Vacations	**Average Prov'l Score**	**Cape Breton**	**South Shore**	**Annapolis Valley**	**Fundy Shore**	**Eastern Shore**	**Northumb. Shore**	**Halifax Urban**
		Score	Score	Score	Score	Score	Score	Score
Current USP	0.13	2	1	1	0	0	0	1
Latent Resource Quality	4	4	4	4	3	2	3	4
Constraints to Growth	3	3	3	3	3	3	2	3
Percent of Perfect Score	44%	58%	51%	51%	37%	31%	31%	51%

NOVA SCOTIA PRODUCT MARKET MATCH STUDY
PRODUCT:
Learning Vacations

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	**POINTS (Excl. Europe)**
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	1	3	1	6	0	0	1	9		0	18
Visitor Satisfaction Levels	3	2	6	3	18	0	0	1	9		0	33
Potential Market Size	5	1	5	1	10	1	10	2	30	3	60	55
Role of the Product as a Travel Motivator	5	1	5	1	10	1	10	1	15	3	60	40
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	1	1.25	1	2.5	1	2.5	1	3.75	1	5	10
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	2	1	2	2	1	1	1	1.5	1	2	6
Growth Potential	4	2	8	3	24	2	16	3	36		0	84
Multi-Season Potential												
Shoulder Season (May/June, Sept/Oct)	5	3	15	3	30	3	30	2	30	1	20	105
November to April	5	2	10	2	20	2	20	1	15	1	20	65
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*33*	**54.3**	*33*	**122.5**	*33*	**89.5**	*33*	**149.3**	*23*	**167.0**	**416**
Score as % of a Perfect Score			33%		37%		27%		30%		36%	31%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	1	7.5	0	0	0	0	0	0	0	0	8
Latent Resource Quality/Potential	6	4	24	4	48	4	48	4	72	4	96	192
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		*19.5*	**49.5**	*19.5*	**84.0**	*19.5*	**84.0**	*19.5*	**126.0**	*19.5*	**168.0**	**344**
Score as % of a Perfect Score			51%		43%		43%		43%		43%	44%
TOTAL: MARKET AND PRODUCT CRITERIA		**52.5**	**104**	**52.5**	**207**	**52.5**	**174**	**52.5**	**275**	**42.5**	**335**	**759**
Score as % of a Perfect Score			40%		39%		33%		35%		39%	36%

NOTES:

REGIONAL COMMENTS

Cape Breton
Some limited USP in this region -some programs offered through Gaelic College and in association with Celtic Colours can be classed as learning vacation, but product is very limited.

Strong latent potential with a variety of potential topics (nature-based, music, language, dance, crafts, etc.) and skilled resources available to lead product.

No major constraints to further development.

South Shore
USP extremely limited; has been some attempt to establish product but not significant to date.

As with Cape Breton, strong latent potential with a variety of potential topics and skilled resources to "teach"; variety of support infrastructure and services available.

No major constraints to further development.

Annapolis Valley
USP extremely limited; has been some limited attempt to establish product and cater to Elderhostel market.

As with Cape Breton, strong latent potential with a variety of potential topics and skilled resources to "teach"; variety of support infrastructure and services available, Atlantic Theatre Festival and Acadia University provide particularly strong resource.

No major constraints to further development.

Eastern Shore
No USP at present.

Resource potential limited – small population base, limited resource and support infrastructure available.

No major constraints to further development.

Northumberland Shore
No USP at present.

Good latent potential, however, particularly building on resources available through St. FX university, theatre, Scottish heritage.

No major constraints to further development.

Fundy Shore
No USP at present.

Good latent potential - particularly in natural heritage subject area (fossils, dinosaurs, tides, birdwatching) and some resources to draw on, such as Fundy Geological Museum.

No major constraints to development.

Halifax Urban Area
Very limited USP at present.

Excellent latent resources available - wide variety of resources available through universities, NASCAD, theatres, museums, etc. to develop and lead courses; extensive infrastructure also available.

No major constraints to development.

LEARNING VACATIONS

MARKET READINESS ISSUES

- Very little market ready product at present although there is a wide range of resources to draw on

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

- Developing partnerships between tourism operators and resources for learning vacations
- Viability of product especially in the early stages of development

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Potential learning vacation themes include:
  - Marine archaeology
  - Ship/yacht building/repair
  - Marine biology
  - Marine history
  - Small craft seamanship
  - Sports learning vacations
  - Gaelic culture/language
  - Outdoor adventures
  - Acadian culture/music
  - Wooden shipbuilding
  - Marine ecology
  - Whales/seabirds
  - Naval architecture
  - Aquaculture
  - Music/arts - theatre, music, dance, arts
  - Black heritage/culture
  - Bras' d'Or Lakes - the Inland Sea

PRODUCT: CRUISE SHIP VISITS

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
MARKET CRITERIA					
Existing Visitor Market Size • *Scores estimated based on total cruise ship visitation - total passengers 108,300 in 1998*	**Estimated Score: 1**	**Estimated Score: 1**	**Estimated Score: 1**	**Estimated Score: 3**	**Estimated Score: 1**
Visitor Satisfaction Levels • *No data available*	N/A	N/A	N/A	N/A	N/A
Potential Market Size • *Estimated based on Cruise Lines Industry Association survey, % of respondents indicating they definitely/probably will take a cruise within the next five years. Used for all markets though research is US based.* • *Applied to total person trips from the market, to or within Canada (inter-prov'l)*	38% Potential Market: 620.5 thousand person trips **Score: 2**	38% Potential Market: 1.3 million person trips **Score: 3**	38% Potential Market: 728.5 thousand person trips **Score: 2**	38% Potential Market: 1.5 million person trips **Score: 3**	38% Potential Market: 880 thousand person trips **Score: 2**
Role as a Travel Motivator • *Product a travel motivator by its nature*	**Score: 5**	**Score: 5**	**Score: 5**	**Score: 5**	**Score: 5**
Role as a Demand Supporter • *Comments are subjective*	No role as a demand supporter for any market since cruise ships cannot embark/disembark passengers in Halifax if they start in the US				
Growth Potential • *Estimated scores based on growth in cruise market over last decade*	Cruise Lines International Association reports average annual growth in passenger volume of 8% since 1980 Nova Scotia experienced increase of 70% from 1997 to 1999 and expected to continue to grow **Score: 5 for all markets**				
Multi-Season Potential - Shoulder • *Comments are subjective*	Good potential in this season, particularly from the US market				
Multi-Season Potential - Nov to April • *Comments are subjective*	No potential				
PRODUCT CRITERIA					

PRODUCT: CRUISE SHIP VISITS

CRITERIA	ATLANTIC CANADA	ONTARIO	QUEBEC	NEW ENGLAND MID-ATLANTIC	EUROPE
Current Unique Selling Proposition • *Comments are subjective*	Nova Scotia has no USP in regional market but moderate in other Canadian and US markets - cruise lines seek alternative destinations to the Caribbean during the late summer/fall hurricane season and Nova Scotia well positioned/located to respond to this opportunity.				
Latent Resource Quality/Potential • *Comments are subjective*	Reasonably good quality resource potential -some excellent harbours and ports, scenic coastlines, variety of interesting land tours available, also shopping, sightseeing and entertainment.				
Constraints to Growth • *Comments are subjective*	No major constraints to growth; need for additional infrastructure (transportation and tours particularly) to accommodate current demand; developing additional ship berthing infrastructure is very expensive - may become a constraint in future if number of ship visits keeps growing.				

REGIONAL SCORES

Cruise Ship Visits	Average Prov'l Score	Cape Breton	South Shore	Annapolis Valley	Fundy Shore	Eastern Shore	Northumb. Shore	Halifax Urban
		Score	Score	Score	Score	Score	Score	Score
Current USP	2.1	2	1	0			0	5
Latent Resource Quality	3	2	3	1			1	4
Constraints to Growth	3	3	1	1			1	3
Percent of Perfect Score	53%	46%	32%	12%			12%	81%

PRODUCT:
Cruise Ship Visits

MARKET		**ATL. CAN.**		**ONTARIO**		**QUEBEC**		**NEW ENG/MID ATL**		**EUROPE**		**TOTAL**
Average Yield (1998)		**$348**		**$762**		**$699**		**$927**		**$1,473**		
Market Weight			1		2		2		3		4	**POINTS**
Current Visitation to NS: May to Oct. 1998		664,813		337,549		77,002		172,231		34,786		**(Excl.**
Current Visitation to NS: Full Year 1998		1,105,089		424,748		96,485		186,116		43,336		**Europe)**
CRITERIA	Weight	Score	Points	Score	Points	Score	Points	Score	Points	Score	Points	
MARKET POTENTIAL CRITERIA												
Existing Visitor Market Size	3	1	3	1	6	1	6	3	27	1	12	42
Visitor Satisfaction Levels NO DATA	3		0		0		0		0		0	0
Potential Market Size - (1)	5	2	10	3	30	2	20	3	45	2	40	105
Role of the Product as a Travel Motivator	5	5	25	5	50	5	50	5	75	5	100	200
Role of the Product as a Demand Supporter (total weight 3)												
- Touring Market	1.25	0	0	0	0	0	0	0	0	0	0	0
- Meetings and Incentive Travel Market	0.75	0	0	0	0	0	0	0	0	0	0	0
- Urban Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
- Vacation Destination Market	0.5	0	0	0	0	0	0	0	0	0	0	0
Growth Potential	4	5	20	5	40	5	40	5	60	5	80	160
Multi-Season Potential:												
Shoulder Season (May/June, Sept/Oct)	5	2	10	3	30	3	30	4	60	3	60	130
November to April	5	0	0	0	0	0	0	0	0	0	0	0
Market Awareness - NO DATA	3		0		0		0		0		0	0
Sub total: Market Potential Criteria		*30*	**68.0**	*30*	**156.0**	*30*	**146.0**	*30*	**267.0**	*30*	**292.0**	**637**
Score as % of a Perfect Score			45%		52%		49%		59%		49%	53%
PRODUCT RELATED CRITERIA												
Current Unique Selling Proposition	7.5	0	0	2	30	2	30	3	67.5	3	90	128
Latent Resource Quality/Potential	6	3	18	3	36	3	36	3	54	3	72	144
Product Potential - Constraints/Capacity for Growth	6	3	18	3	36	3	36	3	54	3	72	144
Sub total: Product Related Criteria		*19.5*	**36.0**	*19.5*	**102.0**	*19.5*	**102.0**	*19.5*	**175.5**	*19.5*	**234.0**	**416**
Score as % of a Perfect Score			37%		52%		52%		60%		60%	53%
TOTAL: MARKET AND PRODUCT CRITERIA		**49.5**	**104**	**49.5**	**258**	**49.5**	**248**	**49.5**	**443**	**49.5**	**526**	**1053**
Score as % of a Perfect Score			42%		52%		50%		60%		53%	53%

NOTES:

1. Potential market size reflects data from a CLIA (Cruise Lines Industry Association) survey - respondents indicating they 'definitely/probably will' take a cruise within the next 5 years. Have applied same percentage across all markets to calculate score.

REGIONAL COMMENTS

Cape Breton
Low USP at present but increasing - Sydney and, for some smaller ships, Baddeck, offer access to unique scenery and Cape Breton experiences, also Louisbourg NHS.

Resource quality for cruise ships moderate - Cape Breton has appeal but time to reach/experience Cabot Trail and Louisbourg in context of time cruise ships usually spend in port is a negative factor.

No major constraints to growth.

South Shore
Very limited USP - some small ships anchor in Lunenburg Harbour (no docking possible) and Shelburne has also seen some cruise ship visits but these communities not able to accommodate the "mega" ships.

Resource quality for cruise ships is moderate - appeal primarily for smaller, "specialty" ships that can get into the ports and where their passengers can be readily accommodated.

Limited suitable ports a major constraint to growth and very difficult/expensive to overcome.

Annapolis Valley
No USP at present; some very limited potential for Digby but tides a major constraint to future development.

Eastern Shore
No potential for cruise ship visits in this region unless very small, specialized vessels such as windjammers.

Lack of suitable ports and infrastructure a major constraint to further development.

Northumberland Shore
No USP at present; some limited potential in Pictou but location not ideal for cruising routes.

Lack of suitable ports and infrastructure also a major constraint.

Fundy Shore No potential for cruise ships in this region.

Halifax Urban Area
Strongest USP in the province at present - excellent deep water port, variety of attractions, shopping, entertainment and ground tours available for cruise passengers.

Latent potential good for further development - though some issues need to be addressed such as availability of transportation infrastructure to transport passengers downtown/to attractions.

No major constraints to development.

CRUISE SHIP VISITS

MARKET READINESS ISSUES

- Insufficient infrastructure to accommodate demand - two ships in port at once stretches capacity of transportation (buses, taxis, etc.) and sightseeing tour capabilities

COSTS/CHALLENGES TO FURTHER DEVELOPMENT

PRODUCT DEVELOPMENT NEEDS/OPPORTUNITIES

- Shore packages to appeal to cruise ship passengers - include sightseeing, shopping, visits to attractions, visit museums/cultural sites, experience local culture (CLIA)
- Additional transportation infrastructure of appropriate quality to handle demand, particularly when more than one vessel in port

OTHER PRODUCTS

A number of other products were originally considered for evaluation in this Product-Market Match Process. These included:

- Major, one-time events
- Commercial Attractions
- Independent Touring
- Ecotourism
- Cultural Experiences - Acadian
- Cultural Experiences - Celtic
- Cultural Experiences - Aboriginal
- Cultural Experiences - African Nova Scotian
- Agri-tourism
- Genealogy

These products were not scored for a variety of different reasons, as discussed below. The fact that these products were not scored does not mean to suggest that there is not potential for them to be further developed as tourism products for Nova Scotia. In fact, other strategies and studies suggest that some of these products have notable latent potential for further development.

Major, One-Time Events

Major, one-time events are, by their nature, very different and therefore it was impossible to score them on the various market and product criteria. However, the research reviewed indicated that major events that have widespread appeal have the potential to attract visitors and to give profile to the destination. The key factors is that the events must have widespread appeal and be positioned to appeal to visitor markets. Major events can also create profile for a particular activity or appeal of the destination, such as The Skins Game can do for golf, and should also be considered from this perspective.

Commercial Attractions

Commercial attractions were not scored for several reasons:

- The difficulty in defining a commercial attractions - there are a wide variety of different types, as well as attractions of varying scale and uniqueness of appeal. Whereas some commercial attractions, e.g Disneyworld, can be major demand-generators on their own, other small scale commercial attractions, such as mini-putt for example, may play only a very minor role in tourism. As such, it was impossible to score this product.

- There was very little data related to the market criteria, particularly with respect to the current situation in Nova Scotia. This is due, in part, to the fact that the commercial attractions product in the province is currently very limited.

- Since commercial attractions tend to be "built", it is difficult to assess the current or latent resource potential for this product category.

Independent Touring

It was decided, in discussions with the Steering Committee, that this product was in fact an amalgam of many of the other products that had been assessed and that it would be very difficult to evaluate it as a product in isolation.

Ecotourism

Ecotourism is, according to numerous sources, a growth product area. However, data related to the specific market criteria being used in this evaluation, particularly with respect to the existing situation in Nova Scotia, was very limited and did not permit a scoring of this product. As well, there is often not a clear distinction in the research data, or in the categorization of products (packages, tours, etc.) between true ecotourism and nature tourism. As such, this was a difficult product to evaluate. As well, it was decided that a number of other product categories could also include ecotourism experiences, e.g. Natural Phenomena, Bay of Fundy Nature Product, Whale watching, Bird watching, etc.

Cultural Experiences - Acadian; Cultural Experiences - Celtic; Cultural Experiences - Aboriginal; Cultural Experiences - African Nova Scotian

Although there is some limited information available on these four different "cultural experiences", it is primarily subjective in nature and there is very little in the way of reliable data on which to base scores for the various market criteria. Also, the Aboriginal and African Nova Scotian cultural experience products have limited development to date in Nova Scotia. There is also considerable overlap between these products and some of the other products, such as music and theatre, for example.

There have been a variety of suggestions made in other reports and strategies about product development opportunities in several of these cultural experiences categories.

Agri-tourism

This product was not scored because of the lack of data related to the market criteria. There was an agri-tourism strategy completed in Nova Scotia several years ago but it did not include any market data and there have been no questions about agri-tourism on the exit study or conversion studies.

Genealogy

This product was not scored because of the lack of data related to the market criteria. Although a variety of "sources" suggest that this is an area of growing interest, there is no market data available on genealogy within the Nova Scotia studies that were reviewed, nor have we been able to find any data from other sources.

SECTION 4

FUTURE RESEARCH NEEDS

THE ECONOMIC PLANNING GROUP of Canada
Tourism and Hospitality Consultants

SECTION 4

RESEARCH NEEDS/GAPS

The Product Market Match analysis undertaken for this assignment was designed to be "data-driven", that is, the scores for most of the criteria for each product were to be generated directly from research data, primarily research with consumers. However, it became evident during the study process that there was insufficient hard data to complete the analysis in this manner. As a result, many of the products have scores for some criteria that are either subjective, or only partially driven by the data available. During the course of this work, we have identified a variety of additional research and pieces of data that would be most helpful in improving the quality of the data used in the product market match analysis and in assessing the qualitative criteria. In some cases, these data needs could be met quite simply by clarifying or changing the wording of questions on survey research that is already being undertaken; in other cases, additional pieces of research would be needed.

As these additional pieces of data become available, they can be inserted in the model, replacing the scores that were "estimated". We are aware of a major piece of research that is currently underway that might provide some particularly useful information for the Product-Market Match Analysis. The CTC, in partnership with Ontario Tourism, the Atlantic Canada Tourism Partnership and a number of other provinces and organizations, is undertaking a major consumer study, called the Product Market Research Study. It was designed to measure the various tourism markets in North America in terms of their product use and activity participation, including the size of each market, their potential for growth and the likelihood that these markets will be attracted to Canada. This research project is looking at both Canadian and US markets, and the results will be available sometime in Spring 2000. Once this research is completed, it should be incorporated in the product market match model.

RESEARCH NEEDS/GAPS

Visitor Exit Survey

A Visitor Exit Survey is conducted in Nova Scotia every four years ago, with the last one being in 1996 and one planned for 2000. The results of this survey are a major and important source of data for the Product Market Match Analysis because they are the only data that can, potentially, be projected to all visitors to the province. Unfortunately, problems with the conduct of the survey in 1996 meant that visitors exiting the province via Amherst were not included in the survey. Since Amherst is the exit for a majority of visitors to the province, only limited data from the 1996 survey was useful for the Product Market Match Study. Assuming that the Amherst exit is included in future exit surveys, there is a wide range of additional information and modifications to the way information is collected that would be useful to the Product Market Match model. We recognize that questionnaire length is a major issues with surveys such as this and that the need to obtain the information identified below will have to be balanced against the other important objectives of this study. Additional data that would be most useful includes:

1. Expand the list of products/activities that visitors are asked about participating in to include all of those on the Product Market Match list, or at least those in the top two tiers of activities as well as some of the highly niche and emerging products, such as the Bay of Fundy experience, tides, fossils, learning vacation experiences. Two products/activities that should be added are recreational vehicle camping and tent camping (not necessarily wilderness camping).

2. Make sure the products/activities asked about are discrete activities. For example:

   - Ask about sea kayaking and canoeing separately, not together
   - Ask about museums and historic sites separately, not together

3. Clarify the definitions of some activities, by changing the wording of the product/activity. Specific examples include:

   - Ask about participation in camping as well as in wilderness camping
   - Define what is meant by wilderness hiking and, potentially, separate walking from hiking. (The participation rate reported for wilderness hiking is very high, suggesting that visitors are not interpreting the question as covering true "wilderness" hiking)

4. Ask questions about the extent or level of participation in various activities. Currently, the information collected only addresses whether the visitor participated in the activity, not how often or for how long. This information would be particularly valuable for activities such as golf, to really get a handle on the extent of visitors' participation in the activity and how important a part it is of their visit to Nova Scotia.

5. Ask about visitation to specific communities, particularly those that fit into the "unique community" category, such as Lunenburg, Annapolis Royal, Baddeck, Cheticamp, etc.

6. Make sure that the names given to specific products/activities and the meaning intended is the same as that used on the conversion studies, so that the data can be compared for differences.

7. Add a series of questions to address the satisfaction levels of visitors with the products/activity they participated in. (This is now asked during the conversion studies, but these studies are conducted after the trip and are not done only with a sample of those people who inquired, not with a sample of all visitors to Nova Scotia). It may be difficult to get at this type of information in an exit survey, given the time constraints, so perhaps an additional piece of research is needed to really address issues such as satisfaction levels, product quality and consumer expectations/demands for enhanced product. The product/service quality assessment research being planned by ACTP presents a potential platform for this satisfaction research.

8. Obtain some additional information on the factors that contributed to the selection of Nova Scotia for the trip. E.g. if it was a pleasure trip, were there any particular activities/products that were major factors.

9. Tabulate the data by Atlantic Canada, Ontario, Quebec, New England/Mid-Atlantic, other US and Overseas markets.

Conversion Studies

Other than the comments above that are relevant, such as the names and grouping of products/activities and consistent definitions, consideration should be given to trying to get a clearer handle on the importance of specific products/activities to the decision to visit Nova Scotia, i.e. as travel motivators. There is a series of questions that generally touch on this but a rewording might lead to a clearer indication of the extent to which products/activities motivate travel and Nova Scotia's position as a destination for these activities.

It would also be useful to compare the results of the conversion study, particularly those concerned with participation in activities, to the results generated by the exit survey. Our experience during the Product Market Match Study indicates that the participation rates reported in the Conversion Studies are substantially higher than those reported in the Exit Survey, likely due to the different profile of those surveyed (i.e. the Conversion Study sample is those who enquired for literature about the province compared to the Exit Survey sample of all visitors).

Nova Scotia Resident Market

The model is designed to accommodate data on Nova Scotia residents but no scores have been input since there is very little information on the activities Nova Scotians participate in while travelling around the province. The Canadian Travel Survey (CTS) does collect some information on activity participation but only a portion of the activities/products in the Product Market Match list are included in the CTS and there are no questions about satisfaction or motivation. Given the importance of Nova Scotia resident travel to the overall tourism revenues in the province, it may be worthwhile doing some research with residents, to explore their participation in activities while travelling as well as the types of things that motivate them to travel around Nova Scotia.

November to April Markets

The November to May Tourism Opportunities study included a limited consumer research component, with the sample selected from those who had enquired for information on Nova Scotia, and it was focussed on exploring experiences with travel at this time of year and potential interest in visiting Nova Scotia.

One significant gap identified in the Product Market Match study was a lack of information on the existing visitors to Nova Scotia during the November to April period. Data on the activities participated in, interests and travel motivation of these visitors would fill in a number of gaps in the Product Market Match Model.

Other Research Information

In order to fill all the other gaps in the Product Market Match Model, and provide additional insights into the expectations of visitors, there are a number of other research needs, as summarized below. In identifying these research needs, we have not taken into account the potential costs that might be involved and there should be some consideration given to the costs/benefits of doing the research necessary to fill these gaps.

- More qualitative research with visitors to Nova Scotia to explore their expectations and needs/demands with respect to specific products, as well as their experiences and satisfaction with products in Nova Scotia. This would help address market readiness issues as well as identify product development needs.
- Information on the market's awareness of Nova Scotia for specific products/activities, compared to their awareness of other destinations for these products/activities. This criteria (Market Awareness) was not scored at all in the Product Market Match Model due to a lack of data.
- Information on the average yield/spending for different products. Research done by product specific associations, e.g. Golf related associations, and various other sources, suggests that markets that travel to participate in specific activities have different levels of spending or yield. Unfortunately, there is insufficient sample sizes within the Nova Scotia Exit Survey to look at the spending levels of those who participate extensively in one activity. Examining the yield by activity would be an extremely useful variable in determining the relative priority that should be given to different

product categories.

- A region by region assessment of market readiness issues and specific development needs, for selected high priority markets.
- Information on participation in activities by region.

SECTION 5

HOW TO USE THE MODEL

THE ECONOMIC PLANNING GROUP of Canada
Tourism and Hospitality Consultants

SECTION 5

MANUAL FOR PRODUCT-MARKET MATCH MODEL

BACKGROUND

This model was commissioned by Tourism Nova Scotia, Department of Tourism & Culture on behalf of the Product Development Committee of the Nova Scotia Tourism Partnership Council. It was prepared by The Economic Planning Group of Canada as part of the Nova Scotia Product-Market Match Study.

The model presents the relative ranking of more than 40 tourism products in Nova Scotia based on up to eleven criteria; eight market-related criteria and three product-related criteria. The criteria were scored for each of five primary geographic markets available to Nova Scotia, including Atlantic Canada, Quebec, Ontario, New England/Mid-Atlantic and Europe.

The scoring is based on a variety of secondary information sources such as sectoral reports, visitor exit surveys, the Canadian Travel Survey, etc. Where actual data was lacking, a more subjective judgement call was made by the consultants based on their understanding of the tourism product and markets.

The product-related criteria have been scored for the province overall as well as for each of the seven travel regions.

For more detailed information on the scoring process and rationale, please refer to the Nova Scotia Product Market Match Study Report, published in January, 2000.

This model has been built using a LOTUS 123 platform. It includes individual worksheets for each of the fifty or so products that have been evaluated and presents the results for each product in summary ranking reports.

The model has been designed for maximum flexibility and easy updating. Some of its key features include:

- The model is very easy to use - a main input screen [control panel] allows the user to select the type of ranking they are interested in (e.g. by region, province, market or product criteria, etc.) and then immediately see the results and print a summary ranking report.
- The weighting assigned to each criteria can be changed and the changes will flow through all reports generated.
- The TIER thresholds (see main report) can be changed and the changes will be immediately reflected in the reports.

- The rankings of the products can be summarized in many different ways:
    - On a province-wide basis, or regional basis, for market and product criteria together or separately.
    - On a province-wide basis, or regional basis, for each geographic market.
    - On a province-wide basis, or regional basis, either including or excluding the scores for the Europe market.
    - On a province-wide basis, or regional basis, for each criteria or for any combination of criteria.
    - On a province-wide basis, or regional basis, for criteria related to future potential only, that is excluding the criteria on existing visitor market size, existing satisfaction levels and current unique selling proposition.
    - In a cluster of nature-related products or culture/heritage related products.

As new data becomes available, the worksheets can be updated to reflect changes in the marketplace and in product development.

The following instructions describes how to prepare reports (rank ordered product listings) based on the different data and reporting configurations described above.

INSTRUCTIONS

The **CONTROL PANEL** is where the user defines the configuration of the desired reports. The **REPORT PANEL** contains the final output reports, as well as tables showing some of the variables represented by these reports.

Step by Step Process

I. Go to the **CONTROL PANEL** (click ***'RUN MODEL'*** button at the top of the start page). Appendix IA presents a visual graphic of the CONTROL PANEL.

A. **DATA CONFIGURATION** *(NOTE: These must be completed in the following order each time any one of the options need to be changed.)*

1. Click the ***'RESET ALL'*** button to return all data to the starting defaults. (this is critical before completing the following steps).
2. **Region Selection**: Select the region you wish the report to be applicable for (i.e. province overall, or one of the seven travel regions).

If selecting one of the seven travel regions, the scores for the product-related criteria change to reflect the situation in the specified region, but the scores for the market-related criteria do not change.

3. **Criteria Selection**: This step allows you to select any combination of criteria to be used in the total scoring calculations. The default is to include 'all' criteria. However, by clicking on the ***'SELECT CRITERIA TO BE EXCLUDED'*** button, you can exclude one or more of the criteria in the scoring calculations.

   There are also three *'quick pic'* criteria combinations that can be selected, they are defined as follows:

   PRODUCT-RELATED CRITERIA - only those three criteria related to the existing status or potential of the product.

   - Current Unique Selling Proposition
   - Latent Resource Quality/Potential
   - Product Potential - Constraints/Capacity for Growth

   MARKET-RELATED CRITERIA - eight criteria related to the market situation.

   - Existing Visitor Market Size
   - Visitor Satisfaction Levels
   - Potential Market Size
   - Role of the Product as a Travel Motivator
   - Role of the Product as a Demand Supporter
   - Growth Potential
   - Multi-Season Product
   - Market Awareness

   CRITERIA RELATED TO POTENTIAL - this includes all criteria except those related to the existing situation - i.e. existing visitor market size, existing satisfaction levels, or current unique selling proposition.

Please note that the Criteria Weightings can be changed only by the Model Administrator.

At this point you can 'run the report' by clicking on the ***'RUN REPORT'*** button (note that the default report will not include scores for the European market unless you make the change described in Section "B'. below).

These four steps have configured the data contained in each of the product worksheets that will subsequently be used in the reports.

You can further manipulate the report by changing the contents of what the report contains, rather than actually changing the data contained in the worksheets, by following the next few steps.

Note: Once the data has been configured as per the above steps, you can toggle among the following options and view the different resulting reports without repeating the above steps.

B. **REPORT CONFIGURATION** (NOTE: These options do not need to be completed in any particular order and can be 'toggled' back and forth without impacting the validity of the report.)

1. **Include or Exclude the European Market scores** - the default is to 'exclude' the European market scores in the total scoring of the product due to a lack of data for this market pertaining to some of the criteria for some of the products. However, the 'status' column on the report panel provides an indication of those products where 'caution' should be used due to lack of available data for this market.

2. **Geographic Origin Market** - this option allows you to view how each product ranks based on the scoring relative to any one of the geographic origin markets (i.e. Atlantic Canada, Quebec, Ontario, New England/Mid-Atlantic, and Europe). The default is to combine the scores for all these markets into a total.

Click the ***'RUN REPORT'*** button to view the results of the defined configurations.

C. **NAVIGATING THE PRODUCT WORKSHEETS**

Each of the products has a detailed worksheet showing the scoring and calculation of total points by market and by criteria. The individual product worksheets can be viewed by clicking on the appropriate button in the control panel (Section C). Each product worksheet also has a navigation button at the top that will take you back to the control panel.

To print the worksheet, highlight (select) the area you wish to print (typically cells A1...M50) and print using the print command under file menu or the print icon in the icon toolbar.

The products identified in the last section of the control panel are products that haven't been included in the summary reports due to insufficient data.

II. THE REPORT PANEL

Click on the ***'RUN REPORT'*** button on the CONTROL PANEL to go to the REPORT PANEL.

This panel contains the results of the data and report configurations defined by the user in the CONTROL PANEL. This panel also contains some tables presenting the criteria or variables that are relevant to the current report summary.

NOTE: It is very important that none of the cells contained in the report are modified in any way. They are ***unprotected*** in order to allow for the rank ordering process to take place.

A. REPORT PRINTOUT:

To print the report summary the user needs to highlight the area with the white background. Once this area has been selected, print the report by using the print command in the file menu or the print icon in the icon toolbar.

The left-hand column entitled 'STAT**' shows the reliability of the scoring for each of the products. Note that this is only valid if ALL criteria have been included in the scoring. An indicator of 'ALL' means that all criteria and markets have been scored for that product, 'OK' means that most of the criteria and markets have been scored for the product (5 or fewer blank cells - total number of cells is 70 if Europe scores are included). 'CAUTION' indicates that there are more than five blank cells in the product's worksheet and that caution should be used when reading the results for this product. *See the main report for more details on this indicator.*

B. VIEWING REPORT DETAILS

The REPORT PANEL also contains background information relating to the current report. View the following tables by clicking on the appropriate buttons.

1. **CRITERIA DETAILS** - this is applicable if the criteria used in the scoring process have been changed (Step 3 - Data Configuration). If not all the criteria have been included in the configuration of the report, the table showing which criteria have or have not been included can be viewed by clicking on the ***'See Criteria Details'*** button. This table should be printed along with the report as a reference document.

2. **ADJUSTED WEIGHTS** - pushing this button will present a table showing the default criteria weights and the adjusted criteria weights used in the current report. Again, if the criteria weights have been adjusted from the default, this table should be printed as a reference

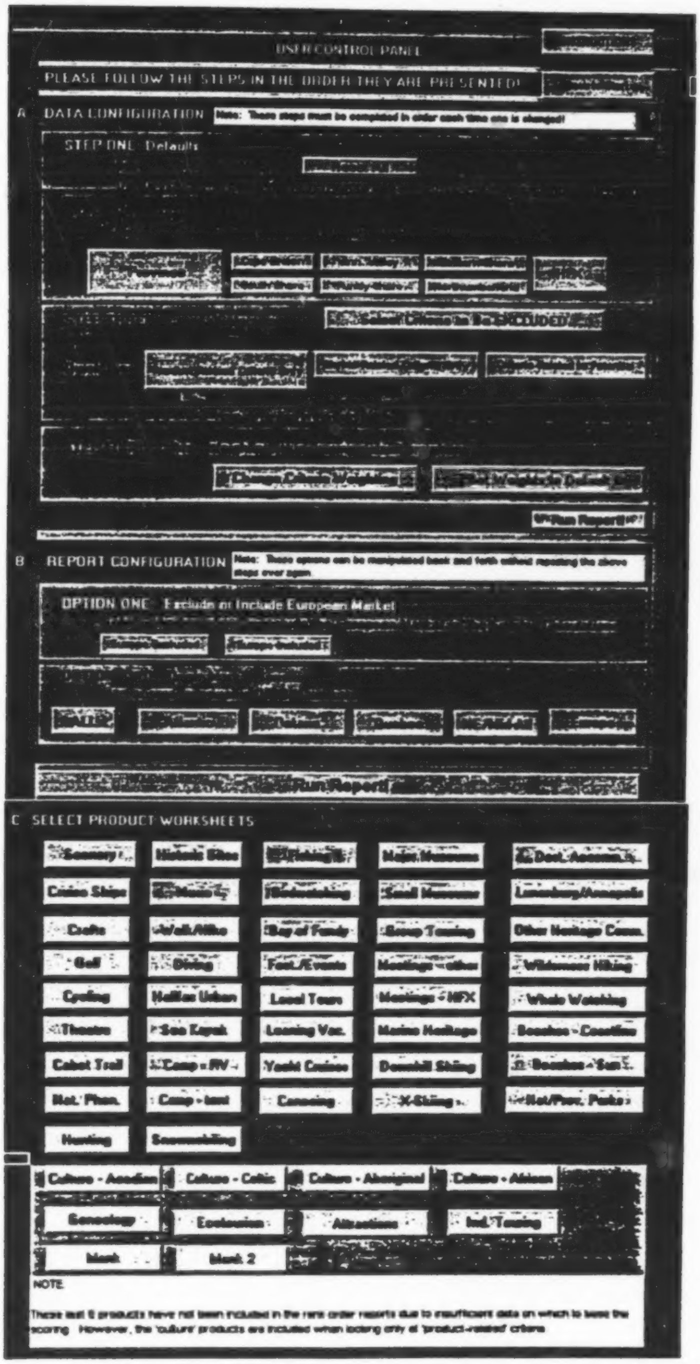
document along with the product ranking report.

Please note that the TIER SETTINGS thresholds can be changed by the Model Administrator only.

C. CLUSTER REPORTS

You can also select to view only those products that fit into two predefined product clusters, namely *nature* and *culture/heritage*type products. Clicking on the appropriate buttons will select only those products belonging to that cluster and create a rank order of these products relative to each other. These reports can be printed by highlighting (selecting) the cells with the white background and using the print command under the file menu or the print icon on the icon toolbar.

APPENDIX I-A
SCREEN CAPTURE OF CONTROL PANEL



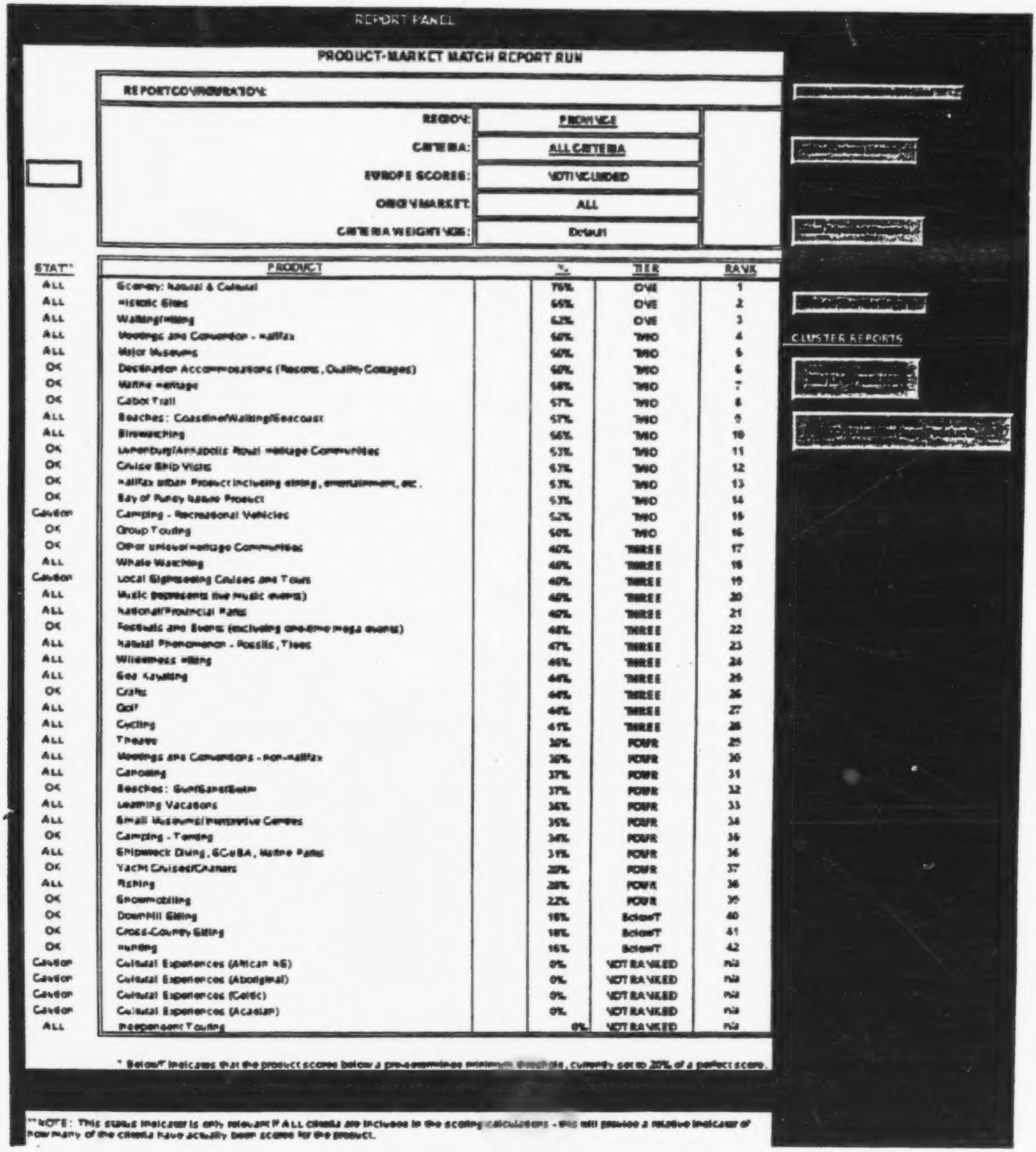
Note: These steps must be completed in order each time one is changed!

Note: These options can be manipulated back and forth without repeating the above steps over again.

NOTE:

These last 8 products have not been included in the rank order reports due to insufficient data on which to base the scoring. However, the 'culture' products are included when looking only at 'product-related' criteria.

APPENDIX I-B
SCREEN CAPTURE OF REPORT PANEL



PRODUCT-MARKET MATCH REPORT RUN

REPORT CONFIGURATION:

REGION: PROVINCE
CRITERIA: ALL CRITERIA
EUROPE SCORES: NOT INCLUDED
ORIGIN MARKET: ALL
CRITERIA WEIGHTINGS: Default

STAT**	PRODUCT		%	TIER	RANK
ALL	Scenery: Natural & Cultural		76%	ONE	1
ALL	Historic Sites		65%	ONE	2
ALL	Walking/Hiking		62%	ONE	3
ALL	Meetings and Convention - Halifax		60%	TWO	4
ALL	Major Museums		60%	TWO	5
OK	Destination Accommodations (Resorts, Quality Cottages)		60%	TWO	6
OK	Marine Heritage		58%	TWO	7
OK	Cabot Trail		57%	TWO	8
ALL	Beaches: Coastline/Walking/Seacoast		57%	TWO	9
ALL	Birdwatching		56%	TWO	10
OK	Lunenburg/Annapolis Royal Heritage Communities		53%	TWO	11
OK	Cruise Ship Visits		53%	TWO	12
OK	Halifax Urban Product including dining, entertainment, etc.		53%	TWO	13
OK	Bay of Fundy Nature Product		53%	TWO	14
Caution	Camping - Recreational Vehicles		52%	TWO	15
OK	Group Touring		50%	TWO	16
OK	Other Unique/Heritage Communities		49%	THREE	17
ALL	Whale Watching		49%	THREE	18
Caution	Local Sightseeing Cruises and Tours		49%	THREE	19
ALL	Music (represents live music events)		49%	THREE	20
ALL	National/Provincial Parks		49%	THREE	21
OK	Festivals and Events (including one-time mega events)		48%	THREE	22
ALL	Natural Phenomenon - Fossils, Tides		47%	THREE	23
ALL	Wilderness Hiking		46%	THREE	24
ALL	Sea Kayaking		44%	THREE	25
OK	Crafts		44%	THREE	26
ALL	Golf		44%	THREE	27
ALL	Cycling		41%	THREE	28
ALL	Theatre		38%	FOUR	29
ALL	Meetings and Conventions - non-Halifax		38%	FOUR	30
ALL	Canoeing		37%	FOUR	31
OK	Beaches: Surf/Sand/Swim		37%	FOUR	32
ALL	Learning Vacations		36%	FOUR	33
ALL	Small Museums/Interpretive Centres		35%	FOUR	34
OK	Camping - Tenting		34%	FOUR	35
ALL	Shipwreck Diving, SCUBA, Marine Parks		31%	FOUR	36
OK	Yacht Cruises/Charters		29%	FOUR	37
ALL	Fishing		28%	FOUR	38
OK	Snowmobiling		22%	FOUR	39
OK	Downhill Skiing		18%	BelowT	40
OK	Cross-Country Skiing		18%	BelowT	41
OK	Hunting		16%	BelowT	42
Caution	Cultural Experiences (African NS)		0%	NOT RANKED	n/a
Caution	Cultural Experiences (Aboriginal)		0%	NOT RANKED	n/a
Caution	Cultural Experiences (Celtic)		0%	NOT RANKED	n/a
Caution	Cultural Experiences (Acadian)		0%	NOT RANKED	n/a
ALL	Independent Touring		0%	NOT RANKED	n/a

* BelowT indicates that the product scores below a pre-determined minimum threshold, currently set to 20% of a perfect score.

** NOTE: This status indicator is only relevant if ALL criteria are included in the scoring calculations - this will provide a relative indicator of how many of the criteria have actually been scored for the product.